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ANDERSON ECONOMIC GROUP

Commercial Market Analysis: South Lansing

Commissioned by:
Lansing Economic Development Corporation

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Table of Contents

DRAFT

Executive Summary

INTRODUCTION

South Lansing, though appealing in its proximity to downtown Lansing and connectivity to major roadways and intersections, has had difficulties attracting the types of business that will help create a more inviting identity. As downtown and urban living become increasingly desirable, the outer core areas, like south Lansing, have experienced decline.

As part of efforts to reverse this decline, the Lansing Economic Development Corporation (LEDC) retained Anderson Economic Group, LLC (AEG) to analyze the retail and commercial conditions in south Lansing. The purpose of this study is to present the findings of our analysis, and our recommendations for improving the retail and commercial climate in south Lansing.While our analysis covered all of south Lansing, an emphasis was placed on the corridors and intersections shown below.

Corridors	Intersections
Cedar Street	Cedar St./Pennsylvania Ave./Edgewood Blvd.
Martin Luther King Jr. Blvd.	Waverly Rd. and Jolly Rd.
Waverly Road	Martin Luther King Jr. Blvd & Holmes Rd.
Pennsylvania Avenue	Pleasant Grove Rd. & Holmes Rd.

OVERVIEW OF APPROACH

Our approach included qualitative and quantitative analyses. This included:

1. Public outreach including meetings with community stakeholders; a focus group for the business community; and an online survey, available to the entire community;
2. An analysis of demographic, socioeconomic, and economic characteristics and trends in south Lansing compared to surrounding areas;
3. A field assessment of south Lansing and its major corridors and intersections;
4. A transportation analysis, conducted by Sam Schwartz Engineering;
5. An analysis of office space in the area; and
6. A supply and demand analysis for retail and commercial product in the market.

SUMMARY OF FINDINGS

Community Engagement

Our surveying, focus group, and meetings with area stakeholders and local officials revealed a common desire for revitalization and/or (re)development of various locations throughout south Lansing. Key findings are summarized below.

- Several survey and business focus group participants, as well as those interviewed, felt there was a need for beautification of major corridors, reuse or demolition of vacant buildings, better building maintenance, road and sidewalk repair, and traffic calming measures.
- A majority of business focus group participants, if given the opportunity, would invest in mid- to high-end restaurants, 'fresh' fast-food restaurants, home improvement and furnishing stores, grocery and specialty food stores, and entertainment venues in south Lansing.
- A high number of survey respondents who were also residents of south Lansing indicated a satisfaction of grocery and produce offerings, office supplies stores, and fast-food restaurants, but a dissatisfaction with the quality and availability of fine-dining and upscale restaurants, apparel and shoe stores, salons and spas, and sporting goods and book stores.

Market Supply and Demand

Our analysis of the market supply and demand found that there is an implied supply and demand gap of roughly 865,000 square feet of retail space in south Lansing for 2010. This gap is found under a conservative scenario and largely consists of space in the general merchandise; amusement, gambling, and recreation; and performing arts, spectator sports, and related industries. The aggressive scenario, which represents the maximum amount of implied gap of square footage, shows implied opportunity in excess of 1,734,000 square feet of retail space for 2010. Much of this space falls under the categories mentioned in the conservative scenario, in addition to building material, garden equipment and supplies dealers; food and beverage stores; and health and personal care stores.

For more discussion of retail supply and demand, see “Retail Supply and Demand” on page 22.

RECOMMENDATIONS

Based on our analysis, market visits, and feedback from the public, we have developed recommendations for improving south Lansing's retail and commercial business market. These recommendations, all of which are discussed in detail at “Strategy Recommendations” on page 31 include:

1. Develop strategies for addressing vacant properties that are in poor repair or aesthetically unpleasant.
2. More regularly and strongly enforce codes, such as sign regulations, mitigation of nuisances, and regulations of pawn shops, to encourage better property maintenance and desirable business practices.
3. Use roadway classifications and overlay zoning to better align land uses along main corridors, such as Pennsylvania, Martin Luther King, Jr., Cedar, and Waverly.
4. Promote the establishment of corridor or business improvement districts in south Lansing as a means of bring the business community together and as a

way of establishing unique brands for different commercial districts within south Lansing.

5. Focus economic development and business attraction and retention efforts on industries that can leverage south Lansing's unique assets, including its location and connectivity with major highways. Professional service firms, like accounting companies and architectural firms, can benefit from the proximity to multiple cities in southern Michigan, while tourism and convention businesses, like hotels, the Potter Park Zoo, and Lansing's parks, can benefit by drawing in more people from markets outside of south Lansing.
6. Make pedestrian and bicyclist friendly transportation improvements to facilitate non-motorized movement throughout the community. Doing so will generate more local shopping, stimulate recreational activities, and create stronger community ties. It can also reduce congestion and traffic volumes, making roads safer for drivers and pedestrians alike.
7. Use roundabouts to improve intersection traffic flow and safety, as well as aesthetics. Retail neighborhood nodes, such as the Jolly and Waverly intersection, or the Waverly and Holmes intersection, are particularly well suited for traffic circles, as is the area at Pennsylvania, Waverly, Edgewood, and I-96.
8. Adopt "smart parking" guidelines to mitigate large and unused parking lots, and to discourage any future developments with over parking. By requiring new development to demonstrate parking needs, as opposed to assigning a minimum parking requirement, future development will use less space for parking, generating positive aesthetic and environmental impacts.
9. Create additional community space and "third places" by adding pocket parks, creating and enhancing green spaces, and by providing "third places" to facilitate regular community gatherings and family activities.

We have also developed more specific recommendations for main intersections in south Lansing. These are summarized here, and presented in more detail at "Intersection Specific Conditions and Recommendations" on page 40.

Cedar St./Pennsylvania Ave./Edgewood Blvd. There is an opportunity at the Cedar, Pennsylvania, and Edgewood Boulevard intersection to create a gateway at the I-96 interchange; create green space for neighboring residential areas; utilize infill development to relocate specific types of businesses to the Edgewood Shopping Center; expand the availability of dining options for residents and visitors, and establish an overlay zone for design standards.

Martin Luther King Jr. Blvd & Holmes Rd. As a major focal point in south Lansing, we focused on potential improvements to Logan Square and the use of frontage along MLK for community and entertainment space. Establishing a BID or BIZ will be an important step in revitalizing and branding this important area.

Pleasant Grove Rd. & Holmes Rd. The Pleasant Grove and Holmes intersection would benefit from the creation of a BIZ, which would help restore pride in ownership, provide business owners with the tools to make needed improvements, and help in establishing design standards as a part of an overlay zone for future development efforts. In the long-run a mixed-use development could also be pursued to strengthen the neighborhood feel of this intersection.

Waverly Rd. & Jolly Rd. The Waverly and Jolly intersection is isolated from the rest of south Lansing, creating a greater need for a strong neighborhood retail district with a positive image. It is important to create design standards for future developments in this area, which will encourage desirable aesthetics, and help to attract more investment. The removal of outdated and obsolete buildings, sidewalk improvements, and the redevelopment of the southeast corner will be important steps in creating a new and positive identity for this intersection.

CAUTIONS AND LIMITATIONS

These analyses and recommendations should not be used as the sole basis for deciding whether or not to pursue a development. Actual site, building, parking, utility, environmental, grading, civil engineering, architectural plans, financial, and construction documents are not included within the scope of this work. Further, local economic and market conditions may change in ways that would impact the usefulness of our analyses. Careful consideration should be given to such changes before investment decisions are made.

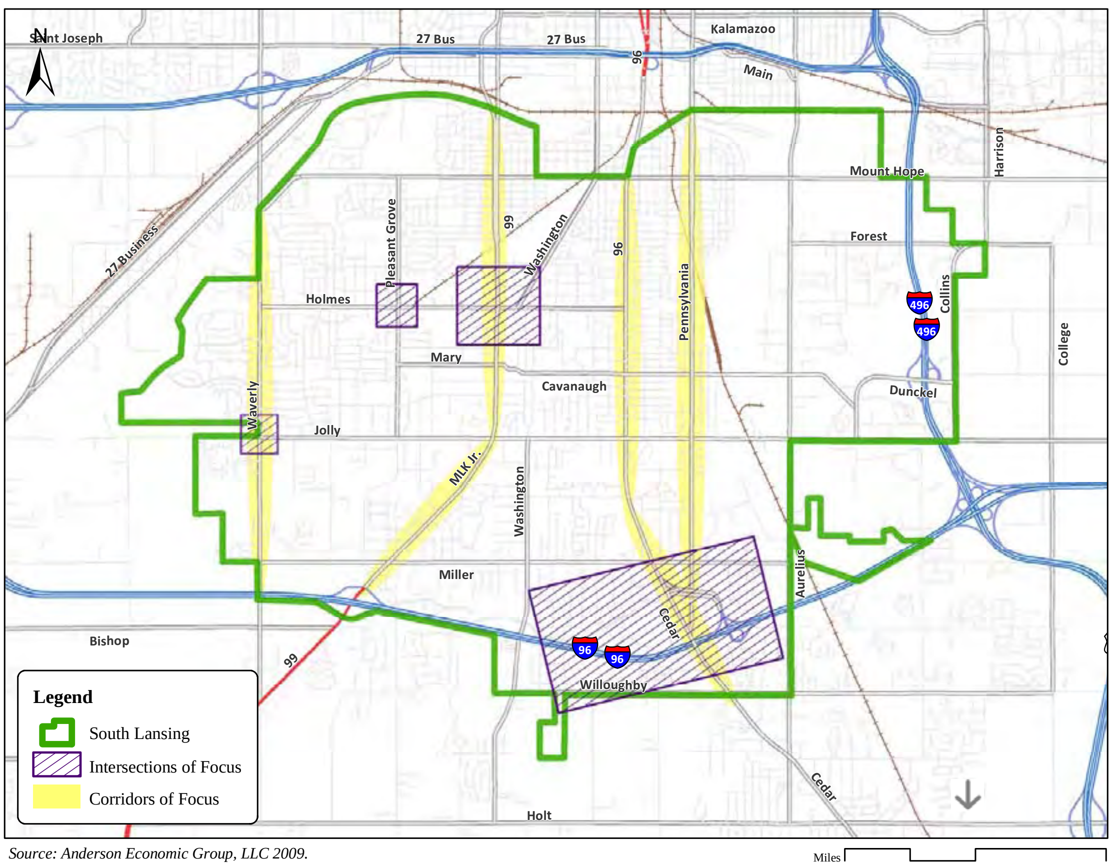
I. Overview of South Lansing & Study Areas

PROJECT PURPOSE

The LEDC retained Anderson Economic Group to conduct a study for south Lansing and to identify strategies for economic (re)development within four arterial corridors and intersections, with a focus on retail and commercial business. This study will provide an account of where south Lansing stands today and what opportunities may exist for future investment and revitalization in the following areas:

Corridors	Intersections
Cedar Street	Cedar St./Pennsylvania Ave./Edgewood Blvd.
Martin Luther King Jr. Blvd.	Martin Luther King Jr. Blvd & Holmes Rd.
Pennsylvania Avenue	Pleasant Grove Rd. & Holmes Rd.
Waverly Road	Waverly Rd. & Jolly Rd.

FIGURE 1. Overview of south Lansing and Areas of Focus



Source: Anderson Economic Group, LLC 2009.
Base map provided by ESRI, Inc. 2009.

FIELD ASSESSMENT

The field assessment was conducted to supplement information gathered through various sources, and to provide a visual sense of the area's characteristics and range of land uses along each corridor and intersection.

Area Overview

South Lansing has experienced success in several areas, such as the Edgewood Boulevard shopping center and cinemas off of Cedar Street, and the Midway/ Corporate Centre office industrial park east of Pennsylvania Avenue. However, traditional planning practices in the mid to late 20th-century have added to difficulties in planning for future growth in the area. Major corridors in south Lansing, while providing easy access to other parts of town and allowing for high capacity vehicle traffic, have become less desirable in an age when walkability and downtown living is becoming more desirable.

There is a general perception that further investment in south Lansing is hindered by a stigma of high crime and violent activities in specific areas. Spotty development, lack of curb appeal and property upkeep, and vacant buildings continue to exacerbate negative perceptions about doing business in south Lansing. However, the area does have strong neighborhood associations, an active business community, and parks and recreation, providing a strong base on which future economic development efforts can be established.

Corridors

Pennsylvania Avenue. Pennsylvania Avenue is the eastern most major corridor in south Lansing. On the north end, a limited amount of convenience retail and food services (at Mt. Hope) is surrounded by well-established neighborhoods with detached, single-family homes and community churches. Heading south across the overpass, institutional centers, such as the Ingham Regional Medical Center and the Safety Council, and businesses like Holt Auto Sales Showroom, Career Quest, and the Salvation Army occupy the east side of the street. The west side of the street is home to a few older office buildings, parks, churches, and homes.

As one continues to head south, the corridor becomes scattered with single-level retail, business, and service establishments, most of which have significant setbacks and parking in front. South of Jolly, Pennsylvania becomes concentrated with auto service and repair shops and dealerships, among them Hummer, Lexus, and Buick-Pontiac-GMC. Party, liquor, convenience, cash advance, and electronics stores are hard to miss as one heads further south.

Vacancies (including one gas station brownfield) are spotted all along the corridor, but are most prevalent between Cavanaugh and Cedar Street. These vacancies are found in stand-alone and mini strip-mall buildings, and the buildings appear outdated and distressed.

Cedar Street. Cedar Street in south Lansing is known for its high concentration in retail and food service businesses. On the north side of south Lansing, Cedar Street is home to Michigan Works! and the closed Walter French school building. Heading south of Mt. Hope, the corridor is spotted with single-family homes, and retail and service establishments. Here, retail and business activity is spotty and low in density compared to the south end. Many of the businesses here occupy dated, stand alone buildings, with the exception of some updated and newly developed buildings.

South of Holmes, retail and service businesses become more frequent. Here, the corridor is occupied mainly by detached, single-level buildings along the west side, and detached, single-family homes on the east side. As one heads further south toward Jolly Road, the corridor becomes heavy with retail and commercial business, more suitable for five lanes to carry a higher traffic volume.

Most retail and other business vacancies observed in south Lansing appear along Cedar Street between Mt. Hope and Miller Roads, and are found both in small and large stand alone buildings, and older strip mall buildings. Additionally, some existing businesses appear to have fallen back on building upkeep and beautification, and most businesses lack any sort of landscaping. These types of areas are generally avoided by investors, and attract negative attention. However, it is apparent that efforts have been made by some small businesses to establish a positive presence in the area.

Martin Luther King Jr. (MLK). Between Moore's River Drive and the railroad tracks, MLK is divided with a boulevard and is mainly residential, with a couple of convenience retail stores. South of the railroad tracks, the land uses abruptly change from residential to retail and commercial uses, and businesses are somewhat fragmented and scattered. However, many appear to be in good condition, with exception for a lack in landscaping. MLK is home to several fast-food restaurants, limited-service restaurants, food and beverage stores, health care stores, and service/repair shops, electronics, and sporting goods stores.

Heading south from Holmes Road, it is apparent that investments are being made by small businesses to better the area, though two vacant auto dealerships are visible signs of the weakening economy. Most of the businesses along MLK have parking in front, which require various setback depths, depending on the minimum parking requirements. Parking in front is ideal for most customers, but it discourages and poses problems for non-motorized traffic. This parking format also requires more effort from a business owner if they are to maintain aesthetically pleasing property frontage. A more in-depth assessment of the MLK and Holmes intersection is found at “MLK & Holmes” on page 4.

Heading south toward Jolly Road, development is a lower density and becomes more fragmented. Residential areas here are more prevalent and convenience retail is found along the west side of the road. These land uses extend all the way to the south end of MLK in south Lansing.

Waverly Road. Waverly Road in south Lansing is mainly residential, lined with single- and multi-family residential homes and apartment buildings. Neighborhood retail and service businesses are found at the main intersections of Holmes and Jolly. Vacancies appear in some stand alone buildings and a multi-unit building, including a former Rite Aid store. Most of the existing businesses cater to a lower-income demographic, and consist of convenience retail establishments such as Quality Dairy, Coin Laundry, Metro PCS, and liquor and thrift stores. Building maintenance and landscaping is slightly lacking, however, this corridor holds potential for revitalization, as it is on a smaller scale than the other three corridors, and the built environment is more pedestrian friendly. For a more detailed description of the Waverly and Jolly intersection, see “Waverly & Jolly” on page 5.

Intersections

Cedar/Pennsylvania/Edgewood. The Edgewood Shopping Center area, at one point a candidate for the Lansing Mall, remains a regional draw for people living well outside of the area. Located north of I-96, it is the premier feature of the Cedar/Pennsylvania/Edgewood intersection. The successful shopping center is anchored by big box tenants Target and Sam’s Club, and is home to Celebration Cinemas and IMAX Theatre. In between these anchors, several retailers occupy smaller spaces, and three spaces sit vacant. Although the existing ramp configuration can be confusing to area newcomers, direct access off of the freeway makes this shopping center an attractive destination. Additionally, optimal highway visibility provides free advertising.

Feeder streets surrounding the shopping center take one past home improvement stores, auto dealers (one of which has been relocated and sits vacant), and full- and limited-service restaurants. On the northwest corner of Cedar Street and Edgewood Boulevard, a strip mall development is set back, with limited visibility to the high traffic corridor. Retail and service businesses, as well as a medical supplies center occupy the spaces, however, six remain vacant.

In addition to being one of the most visited areas in south Lansing for shopping, this area is home to many of the Lansing area’s accommodations. These include a Days Inn, Econo Lodge, Governor’s Inn, and the Causeway Bay Hotel, which is undergoing a complete renovation. The former Regent Inn, an outdated motel on Pennsylvania Avenue, was recently torn down to make way for a new Nu Union office.

MLK & Holmes. At the MLK and Holmes intersection, efforts have been underway to bring a more positive image to the area with a newer Walgreens and Tim Hortons on the southwest corner. On the opposite corner, an old gas station was torn down and has since been replaced with a new, modern style mini strip-mall being completed. The southeast corner is occupied by a restaurant and health care store, which both have deep setbacks and mostly empty parking lots.

On the northwest corner of this intersection is a Martinizing Dry Cleaners business, and sitting behind this small building is an outdated mini mall, home to businesses such as a Baryames dry cleaner, Subway, tax services, and training and instruction school for truck drivers. Just west of this development lies a vast expanse of parking space in front of the Logan Square shopping center. Currently, a plasma donation center and Save-A-Lot grocery store act as anchors, supported by a children's theatre, dance school, clothing stores, health and beauty store, and dollar store. However, this shopping center has been struggling and roughly half of the space is vacant.

The majority of the building front is not as visible along the main corridor as would be desired by most anchors, which is what a development such as this needs to bring in the high level of traffic to support smaller tenants. Additionally, access to the center is not convenient, and the parking lot is used for truck driving instruction during the day, adding to the lack of appeal to prospective tenants. Currently, there is duplication of offerings at this shopping center, with two beauty supplies stores, two dry cleaners, and two tax service businesses.

Pleasant Grove & Holmes. The Pleasant Grove and Holmes Road intersection is the most neighborhood-oriented intersection of the four. This smaller scale area holds much potential for creating a pedestrian friendly environment that serves the single- and multi-family homes surrounding it.

New City Academy, a public charter school, anchors the northeast corner of the intersection. A small grocery market, meat market, hair salon, carry-out restaurant, Quality Dairy, Boost Mobile, and Metro PCS occupy the other corners. The businesses are located in small, outdated buildings that appear to be in distress, and have little to no landscaping.

Waverly & Jolly. The Waverly and Jolly intersection is surrounded by neighborhoods with single- and multi-family homes and is relatively accessible to pedestrian traffic. Many of the businesses here are located in outdated, dilapidated buildings, some of which are eyesores. A vacant Rite Aid sits on the southeast corner, and to the east of it an outdated strip mall with almost 100 percent occupancy. To the south sits a large coin laundry facility and dry cleaner. The southwest corner is home to a Quality Dairy and attached Metro PCS.

On the northwest corner, three buildings are occupied by a Family Dollar and two convenience and liquor stores. Four buildings, two of which are outdated, sit vacant and were once home to a seasonal Jackson Hewitt Tax Service business, pawn shop, fast-food restaurant, and other small business. The northeast corner is occupied by an Admiral gas station.

RESIDENTIAL CHARACTERISTICS

Age and Type. About 60 percent of the housing stock in south Lansing was built before 1970, compared to 70 percent in the city of Lansing as a whole. south Lansing experienced a significantly higher rate (31.7 percent) of home construction between 1970 and 1989 than in the city of Lansing during the same time period (23.9 percent). This rate was also higher than Ingham County and the state (29.8 and 25.5 percent). See Table 1 for more details.

TABLE 1. Housing Stock Age (share of units)

	South Lansing	City of Lansing	Ingham County	State of Michigan
HUs Built 2000 - 2009	2.9%	2.4%	4.8%	7.7%
HUs Built 1995 - 1999	2.9%	1.9%	5.0%	7.9%
HUs Built 1990 -1994	2.4%	1.8%	4.4%	5.7%
HUs Built 1970 -1989	31.7%	23.9%	29.8%	25.5%
HUs Built 1950 -1969	38.8%	35.0%	31.3%	28.5%
HUs Built Before 1950	21.3%	35.1%	24.6%	24.7%

Analysis: Anderson Economic Group, LLC 2009.
Source: ESRI, Inc. 2009.

As seen in Table 2, south Lansing had a smaller share of detached housing units than the city of Lansing and state in 2000. south Lansing's share of housing units with five to nineteen units per structure was slightly higher (15.6 percent) than both the city as a whole and county (13.0 and 15.4 percent), and significantly higher than the state (7.4 percent). This suggests a higher share of small, renter-occupied apartment complexes.

TABLE 2. Housing Units in Structure (share of units), 2000

	South Lansing	City of Lansing	Ingham County	State of Michigan
HU/Units in Struct: 1-Det	61.3%	63.5%	61.2%	70.6%
HU/Units in Struct: 1-Att	7.2%	5.2%	4.7%	3.9%
2 to 4 Units per Structure	5.0%	8.6%	6.4%	6.2%
5 to 19 Units per Structure	15.6%	13.0%	15.4%	7.4%
20 or More Units per Structure	8.2%	8.0%	8.9%	5.1%
HU/Units in Struct: Mobile	2.7%	1.7%	3.4%	6.5%
HU/Units in Struct: Other	0.0%	0.0%	0.1%	0.2%

Analysis: Anderson Economic Group, LLC 2009.
Source: ESRI, Inc. 2009.

Household Occupancy. Currently, south Lansing has a higher rate of owner-occupied housing units than does the city as a whole (54.1 and 51.0 percent), and a lower rate of renter-occupied housing units (37.6 and 39.2 percent). Additionally, south Lansing has the lowest rate (8.2 percent) of vacant housing units compared to the city as a whole, Ingham County, and the state (10.4, 8.4, and 14.1 percent). Projections for 2014 show a decrease in both owner- and renter-occupied housing units, and slight increases in the vacancy rates in each area.

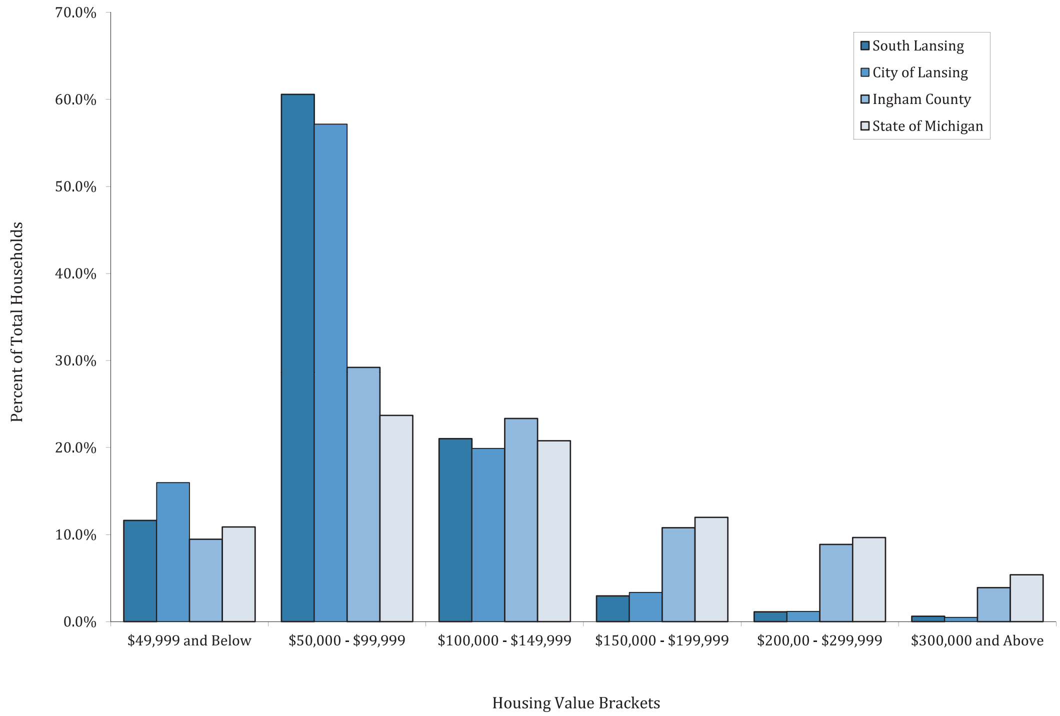
TABLE 3. **Housing Unit Occupancy (share of units), 2000-2014**

	south Lansing		**City of Lansing**		**Ingham County**		**State of Michigan**	
	Units	*Share*	*Units*	*Share*	*Units*	*Share*	*Units*	*Share*
2000 Owner Occupied HUs	17,456	56.9%	28,648	53.9%	65,986	57.4%	2,793,124	66.0%
2009 Owner Occupied HUs	17,072	54.1%	27,811	51.0%	67,111	55.5%	2,900,790	63.2%
2014 Owner Occupied HUs	16,638	52.6%	27,000	49.5%	66,431	54.6%	2,922,291	62.6%
2000 Renter Occupied HUs	11,545	38.8%	20,856	41.9%	42,607	39.3%	992,537	25.8%
2009 Renter Occupied HUs	11,854	37.6%	20,985	39.2%	43,685	37.0%	1,038,382	23.4%
2014 Renter Occupied HUs	12,087	37.5%	21,291	38.5%	44,362	36.1%	1,050,189	22.6%
2000 Vacant HUs	1,638	5.3%	3,618	6.8%	6,463	5.6%	448,618	10.6%
2009 Vacant HUs	2,600	8.2%	5,649	10.4%	10,111	8.4%	648,356	14.1%
2014 Vacant HUs	2,844	9.0%	6,244	11.4%	10,915	9.0%	692,060	14.8%

Source: Anderson Economic Group, LLC 2009.
Base data provided by ESRI, Inc. 2009.

Value. There is a disproportionate share of households in south Lansing and the city as a whole valued between $50,000 and $99,999 (61.6 percent and 58.1 percent, respectively) when compared to Ingham County and the state (33.5 percent and 27.9 percent). As shown in Figure 2 on page 8, the remainder of households in south Lansing and the city are nearly all distributed among the value brackets of $100,000 to $149,999, and $49,999 and below. Though south Lansing and the city do have small shares of households valued at or above $150,000 (4.8 and 5.1 percent), Ingham County and the state have significantly higher shares in that bracket (27.0 and 31.8 percent).

FIGURE 2. Owner Occupied Home Values (share of units), 2009



Source: Anderson Economic Group, LLC 2009.
Base data provided by ESRI, Inc. 2009.

EXISTING TRANSPORTATION CONDITIONS

Overview

It is evident from South Lansing's existing infrastructure that its transportation system was designed to make efficient and convenient to drive. Wide roads, frequent access to commercial developments, and large surface parking lots encourage people to use their cars for every trip. While the transportation network may have met the needs of south Lansing at some point in the past, the current system does not benefit the neighborhood as much as it could. There is a perception of emptiness, particularly with some of the larger roads and unused parking lots, as well as a lack of true walkable and bikeable connections. There will need to be some sort of change in south Lansing's transportation system in order to eliminate this perception. However, this issue is not unique to south Lansing. Many communities across the country are trying to figure out how to transform their transportation system to meet their current transportation demand, as well as spur economic development and improve the infrastructure for pedestrians and bicyclists.

Sam Schwartz Engineering (SSE) conducted a one-day field analysis of the south Lansing's transportation system and also did additional research on traffic volumes, transit ridership, and other transportation policies in the City of Lansing. The following section details our findings of the existing transportation conditions and our preliminary recommendations will be provided further in the report.

The south Lansing neighborhood has one natural boundary (the Grand River) and two man-made boundaries (Interstate 496 to the north and east and Interstate 96 to the south). While the Grand River is an amazing natural feature that has created a number recreational opportunities that Lansing has capitalized on, the interstates have isolated south Lansing from downtown and the rest of the neighboring communities.

Listed below is a brief description of the neighborhood's transportation system our observations.

North-South Roadways

There are four major north-south roadways in south Lansing; Pennsylvania Avenue, Cedar Street, Martin Luther King Jr. Drive, and Waverly Drive. All four roadways provide two through lanes in each direction and, with the exception of Waverly Drive, all of the roadways provide a center median for left-turning vehicles. Daily traffic volumes range from 11,650 vehicles on the southern portion of Waverly Drive to 29,500 vehicles on Cedar Road in the proximity of the Interstate 96 interchange. A map with the most recent daily traffic volume counts is included in the Appendix.

As can be seen from the traffic volume exhibit, there appears to be excess capacity on a number of the north-south roadways. It is assumed that there was a time when these four roads served all of the north-south traffic into and out of Downtown Lansing. That is no longer the case, with Interstate 496 handling most of the Downtown Lansing traffic demand and south Lansing's roadways only carrying local traffic. This change has created excess capacity in a number of locations in south Lansing.

Pennsylvania Avenue. Pennsylvania Avenue is essentially two different roadways. It serves commercial commercials lands uses south of Jolly Road, and residential land uses to the north. The southern portion of Pennsylvania Avenue has higher traffic volumes, significantly more curb cuts, and is oriented towards vehicles. The change in the roadway occurs to the north of the rail overpass as the land uses change from commercial to residential. This section of Pennsylvania Avenue provides a landscaped median and restricts left-turns to signalized intersections only. It is much more pedestrian friendly in this area than the commercial section. Large trees provide a buffer between the travel lanes and the sidewalks, creating a comfortable separation between pedestrians and vehicles. There are some above grade pedestrian bridges, but many of the signalized intersections do not provide for at-grade pedestrian crossings.

Cedar Street. Cedar Street is an arterial roadway that serves almost exclusively commercial land uses. There are a significant amount of unsignalized access drives on Cedar Street. The number of access points is a safety concern and also discourage pedestrian activity. Cedar Street appears to have a large right-of-way, based on the location of the overhead utilities. There are a number of school crossings on the northern portion of Cedar Street.

Martin Luther King Jr. Boulevard. Martin Luther King Jr. Boulevard is a five-lane roadway that lacks an identity. The majority of land uses are commercial in the area, though there are a number of vacancies. No traffic counts were provided for MLK Boulevard, but traffic did not appear to be heavy. This is due both to the lack of land use activity as well as the other north-south roadway alternatives. The roadway widens to six lanes as it approaches Interstate 496.

Waverly Avenue. Waverly Avenue is a four-lane roadway with primarily residential and neighborhood retail land uses. The traffic on Waverly travels at a slower speed than the other three north-south roadways. As it approaches Jolly Road, Waverly Avenue undergoes a "road diet", converting the four-lane cross section into a three-lane roadway (one through lane in each direction and a center left-turn lane) and a bike lane in each direction. This is an example of a Complete Streets project

East-West Roadways

Traffic in south Lansing is oriented to flow north-south, in an out of downtown Lansing. The larger roadways are all north-south and almost all of the commercial land uses are located on these streets. There are four primary east-west roadways in the neighborhood (Jolly Road, Miller Road, Holmes Road and Mount Hope Avenue), though only Jolly Road and Mount Hope Avenue extend across the neighborhood from Waverly Avenue to Pennsylvania Avenue. None of these roadways connect from the River to Interstate 496. All four of the east-west streets primarily consist of residential land uses with some neighborhood retail at the major intersections. Jolly Road, Holmes Road, and Mount Hope Avenue are all four lane roadways. Miller Road is a two-lane roadway with a bike lane. Miller Road was observed to have the most pedestrian activity.

I-96 Interchange at Cedar Street and Pennsylvania Avenue. The I-96 Interchange at Cedar Street and Pennsylvania serves as a primary gateway to the south Lansing neighborhood. Many people that live outside of the neighborhood enter the area at this location to either shop or work at the big box stores. This area experiences the highest traffic volumes in the neighborhood on a daily basis. The existing interchange configuration is a poor entrance to the south Lansing neighborhood due to a number of factors. The interchange is confusing to drivers unfamiliar to area, it presents a number of vehicular operational and safety issues, and is not an aesthetically pleasing front door to south Lansing. Creating a remarkable gateway to south Lansing at this location has the potential to create a positive attitude towards the area. The design of the interchange must be addressed to make this happen.

Pedestrian/Bicycling Conditions

The walkability of S. Lansing varies throughout the neighborhood. In the commercial corridors of Cedar Street, Pennsylvania Avenue, and MLK Boulevard, it can be very uncomfortable for pedestrians to walk in the area. These roadways were designed for automobiles and the developments in the area are almost strictly auto-oriented. This encourages people to drive to wherever they are going, even if it is to a different store in the same shopping center. It is much more comfortable to walk in other areas of the neighborhood, such as on Pennsylvania Avenue north of Jolly Road or along Miller Road. These are primarily residential areas and provide much better walking conditions, like larger, landscaped buffers between the road and sidewalk, more landscaping, and slower traffic. South Lansing has the potential to create safe and pleasant walkable connections throughout the neighborhood.

Bicyclists are a part of south Lansing's transportation system. We observed bicycling activity in the commercial area of Cedar Street and Pennsylvania Avenue and those bicyclists were sharing the lane with automobiles. Additional bicyclists were observed on Waverly Avenue and Jolly Road. Bike lanes are provided on Pleasant Grove and the circular road to the south of the Edgewood commercial development. We did not observe any signage or striping that denoted the bike lanes or alerted drivers to share the roads with bicycling activity. Striping and signage can make drivers more conscious to share the road with bicyclists.

The City of Lansing recently approved a Complete Streets ordinance. The ordinance focuses on restoring the balance on its streets to pedestrians and bicyclists. It requires that 5 percent of the city's state Act 51 fund be spent on improvements that address Complete Streets.

Transit

There are a number of CATA bus routes that run in the study area. There are two typical bus stops that CATA provides: a full bus shelter that protects those waiting for the bus from weather and the roadway, and bus signs that signify where the bus stops are at. Bus shelters are obviously preferred but come at a significantly higher construction cost.

Parking

Off-street parking is easily available in south Lansing. Almost all of the commercial developments in the neighborhood provide significantly more parking than they actually demand. This unused parking creates a vacant feeling at a number of locations. These parking lots were designed to ensure that there was never any time that the demand exceeded supply. Unfortunately, demand has not come close to meeting the available supply and many parking lots have large portions that are never used. Sites with excess asphalt require more drainage due to the excess pervious surface and could use this space for something more beneficial, such as landscaping. These “seas of asphalt” also are not aesthetically pleasing and reduce walkability. As new development is planned as well as re-development of existing sites, parking requirements should be analyzed to ensure that the sites are not over-parked and don't pile on the existing excess parking supply situation.

II. Demographic and Economic Analysis

POPULATION

South Lansing is home to nearly 60 percent of the population in the City of Lansing, at 67,108 in 2009. Though population has been slightly declining over the past 9 years, it has so at a lesser rate than the City of Lansing as a whole, as seen in Table 4. This trend is forecasted to remain the same through 2014 for both south Lansing and the city. Growth in Ingham County has been stagnant since 2000, and is expected to remain so through 2014.

TABLE 4. **Population and Growth, 2000-2014**

	South Lansing	City of Lansing	Ingham County	State of Michigan
2000 Population	68,854	119,127	279,320	9,938,444
2009 Population	67,108	114,894	279,733	10,194,648
2014 Population	66,079	112,800	277,916	10,227,800
CAGR 2000-2009	-0.3%	-0.4%	0.0%	0.3%
CAGR 2009-2014	-0.3%	-0.4%	-0.1%	0.1%
2000 Group Quarters Population	599	893	16,827	249,889
2009 Group Quarters Population	611	910	17,190	259,088
2009 Share of Total Population	0.9%	0.8%	6.2%	2.6%

Analysis: Anderson Economic Group, LLC 2009.
Source: U.S. Census Bureau and ESRI, Inc. 2009.

TABLE 5. **Total Population by Age, 2009**

	South Lansing	City of Lansing	Ingham County	State of Michigan
Ages 0-14	22.0%	22.1%	17.9%	20.2%
Ages 15-24	15.4%	15.6%	22.0%	13.9%
Ages 25-34	15.5%	15.8%	13.8%	12.5%
Ages 35-44	14.1%	14.0%	12.4%	13.8%
Ages 45-54	13.0%	13.2%	13.4%	15.1%
Ages 55-64	10.1%	9.8%	10.5%	11.8%
Ages 65-74	5.1%	5.0%	5.2%	6.6%
Ages 75-84	3.4%	3.2%	3.3%	4.3%
Ages 85+	1.4%	1.3%	1.5%	1.9%

Analysis: Anderson Economic Group, LLC 2009.
Source: U.S. Census Bureau and ESRI, Inc. 2009.

Age. As shown in Table 5, over half of the total population is under the age of 34. Compared to the city as a whole, south Lansing has a similar population age make-up, but compared to the state, south Lansing has a younger population. Over 15 percent of the population is between 25 and 34 years in south Lansing, compared to 12.5 percent in the state and 13.8 percent in Ingham County.

INCOME

Personal. With a per capita personal income of $22,840, south Lansing residents have a higher average income than those in the city of Lansing as a whole ($21,818), but lower than those in Ingham County and the state of Michigan ($25,205 and $26,713). Personal income in south Lansing has increased from 2000 to 2009 at an average annual rate of 2.0 percent, similar to the city of Lansing, Ingham County, and the state of Michigan. In coming years, personal income is expected to increase in each of these areas, though at lower rates. See Table 6.

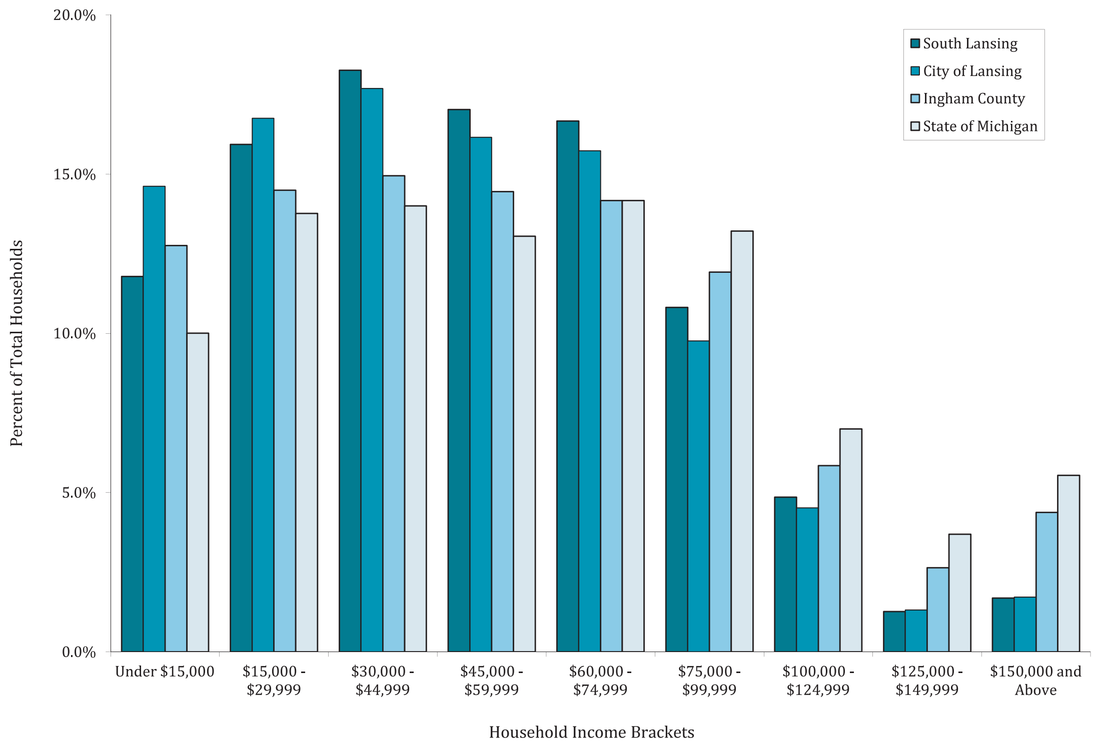
TABLE 6. Per Capita Income and Growth, 2000-2014

	South Lansing	City of Lansing	Ingham County	State of Michigan
1999 Per Capita Income	$19,036	17,923	$21,459	$22,585
2009 Per Capita Income	$22,840	21,818	$25,205	$26,713
2014 Per Capita Income	$23,314	22,333	$25,727	$27,475
CAGR 1999-2009	2.0%	2.0%	1.8%	1.9%
CAGR 2009-2014	0.4%	0.5%	0.4%	0.6%

Analysis: Anderson Economic Group, LLC 2009.
Source: ESRI, Inc. 2009.

Household. The average household income in south Lansing is just over $53,000, compared to about $51,000 in the city of Lansing as a whole. As shown in Figure 3 on page 15, the share of households in south Lansing with an income of $15,000 or higher are generally on par with those in the city of Lansing. The greatest share of households in south Lansing falls in the $30,000 to $44,999 income bracket at 18.3 percent. This compares to 17.7 percent in the city as a whole, 15.0 percent in Ingham County, and 14.0 percent in the state. Both south Lansing and the city as a whole have a significantly lower share (7.8 and 7.6 percent) of households with incomes of $100,000 or higher than Ingham County and the state (12.9 and 16.2 percent).

FIGURE 3. Household Income Brackets - 2009



Source: ESRI, Inc. 2009, with analysis by Anderson Economic Group, LLC 2009.

EDUCATIONAL ATTAINMENT

As seen in Table 7, a bigger portion of south Lansing's residents have attained an associate degree (9.5 percent) than those in the city of Lansing, Ingham County, and the state of Michigan (8.7, 8.4, and 7.9 percent). South Lansing closely trails the city of Lansing and the state of Michigan in share of residents with a bachelor or graduate degree, but Ingham County holds the highest share in both of these categories, at 20.1 and 16.4 percent, respectively.

TABLE 7. Educational Attainment - 2009

	South Lansing		City of Lansing		Ingham County		State of Michigan	
	#	Share	#	Share	#	Share	#	Share
Educational Base (25+)	42,029	100.0%	71,590	100.0%	167,859	100.0%	6,726,228	100.0%
Less than 9th grade	1,263	3.0%	2,681	3.7%	4,203	2.5%	244,186	3.6%
Some High School	3,610	8.6%	7,222	10.1%	10,959	6.5%	623,549	9.3%
High School Grad	11,985	28.5%	19,648	27.4%	39,126	23.3%	2,159,103	32.1%
Some College	11,606	27.6%	18,702	26.1%	38,276	22.8%	1,522,139	22.6%
Associate Degree	4,010	9.5%	6,264	8.7%	14,045	8.4%	528,010	7.9%
Bachelor Degree	6,231	14.8%	10,859	15.2%	33,701	20.1%	1,021,694	15.2%
Graduate Degree	3,324	7.9%	6,213	8.7%	27,549	16.4%	627,547	9.3%

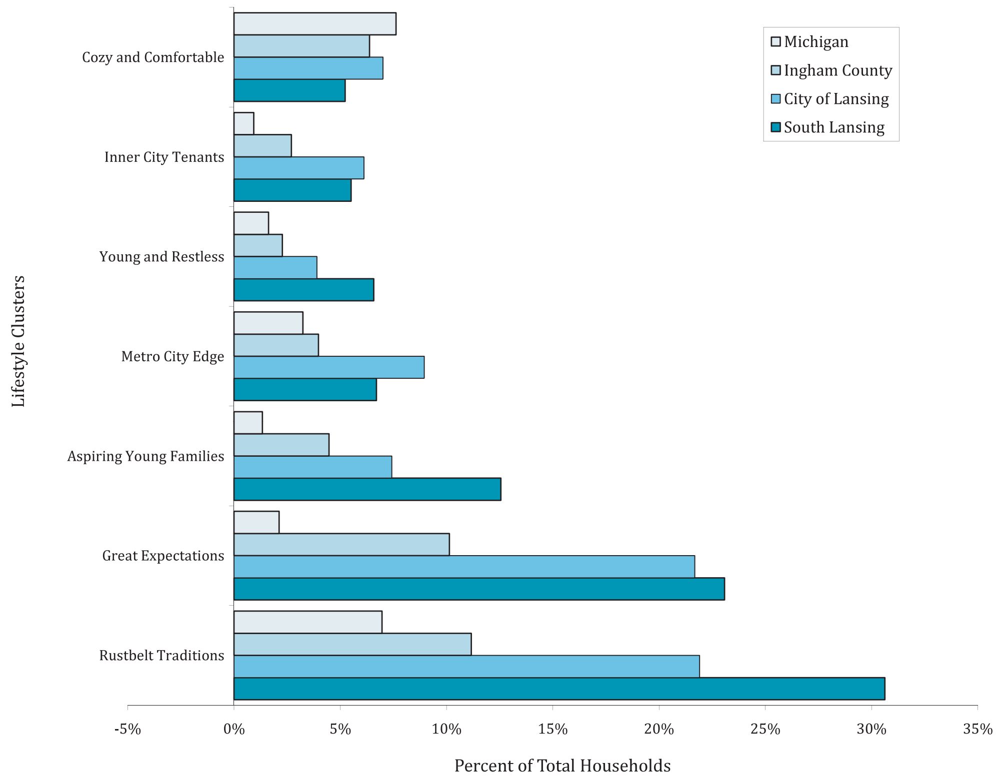
Analysis: Anderson Economic Group, LLC 2009.
Source: ESRI, Inc. 2009.

LIFESTYLE CHARACTERISTICS

Lifestyle clusters allows us to measure groups of demographics together to determine the social structure of the community, rather than examining single demographic characteristics. These data sets take into account multiple socio-economic and demographic variables to determine the "lifestyle" characteristics of a region.

As shown in Figure 4, over half of the households in south Lansing are represented by *Rustbelt Traditions* and *Great Expectations* clusters. These clusters also have a strong presence in the City of Lansing (43.6 percent), Ingham County (21.3 percent) and the state (9.1 percent), but do not have as heavy a concentration. South Lansing also has a significantly higher share of *Aspiring Young Families* households at 12.6 percent, compared to 7.4 percent in the City of Lansing, 4.5 in the county, and 1.3 percent in the state. The next highest concentration of lifestyle clusters in south Lansing is *Metro City Edge* households at 6.7 percent. The City of Lansing takes the edge, however, at 8.9 percent, followed by the county with 3.9 percent, and the state with 1.6 percent.

FIGURE 4. **Dominant Lifestyle Clusters in South Lansing - 2009**



Analysis: Anderson Economic Group, LLC 2009.
Source: ESRI, Inc. 2009.

Half of the *Rustbelt Traditions* households represent the white-collar workers who, for many years, sustained the manufacturing industry that drove local economies. Now, the service industry predominates within this cluster, followed by retail trade. Most residents live in modest, single-family homes, are financially conservative, and regularly use coupons, especially at Sam's Club. Favorite leisure activities include bowling, fishing, and hunting, and attending auto races and hockey games.

Most of the households represented in *Great Expectations* are comprised of young singles and married-couple families. The median age is 33.2 years and the home-ownership rate is approximately 50 percent. Residents in this cluster like to tackle smaller maintenance and remodeling projects, and enjoy going out to dinner and movies, taking advantage of the convenience of fast-food, being active, and attending auto races. Shopping is done at major discount and department stores, and from catalogs.

Aspiring Young Families are largely made up of young startup families, with and without children, and single parents with children. This market is relatively young, with a median age of 30.5, and ethnically diverse, with nearly 20 percent both African-American and Hispanic residents. These households spend much of their discretionary income on their children and homes. Residents spend their time online, searching for employment, researching real estate, and making travel arrangements. Activities include weight lifting, playing basketball, and watching dramas or horror movies on DVD. When eating out, residents prefer family restaurants.

For full descriptions of each of the seven most dominant lifestyle clusters, see Exhibit 7 on page B-15 through B-20. Additionally, detailed demographic tables can be found in Exhibit 4 on page B-5 through B-13. These tables include data for south Lansing, the city of Lansing, Ingham County, and the state of Michigan.

MAJOR EMPLOYERS AND INDUSTRIES

The make-up of jobs and employed residents in south Lansing, and how it correlates to the city as a whole, the county, and the entire state is essential to understanding the local economic base. We have analyzed the local labor force to assess the viability of south Lansing for job creation, and business recruitment and retention. The examination of these indicators is an essential step in identifying a mix of businesses that will be sustainable and complement the community's long-range goals.

Largest Employers. As seen in Table 8, the Lansing region has 17 major employers who employ over 1,000 positions. The majority of these employers are in the public sector, or are subsidiaries of the government. Despite GM's loss in employment throughout the years, it remains the fourth largest employer in the Lansing region, with approximately 6,000 employees.

TABLE 8. **Twenty Largest Employers in the Lansing Region**

Employer	Industry	Employees
State of Michigan	Government	14,355
Michigan State University	Higher Education	10,500
Sparrow Health System	Health Care	7,400
General Motors	Automotive	6,000
Lansing Community College	Higher Education	3,180
Ingham Regional Medical Center	Health Care	2,500
Lansing School District	Education	2,100
Meijer, Inc.	Warehousing & Grocery	2,000
Auto Owners Insurance	Insurance	1,500
Peckham, Inc.	Manufacturing	1,400
Jackson National Life	Insurance	1,393

TABLE 8. Twenty Largest Employers in the Lansing Region

Employer	Industry	Employees
Ingham County	Government	1,258
City of Lansing	Government	1,258
US Postal Service	Government	1,200
Demmer Corp.	Manufacturing	1,200
Wal-Mart	Retail	1,185
Dart Container	Manufacturing	1,144
John Henry Company	Printing	750
Quality Dairy	Food Processing & Grocery	730
Lansing Board of Water & Light	Utility	712

Source: Lansing Economic Development Corporation, 2009.

Ingham Regional Medical Center's home is in south Lansing on Pennsylvania, and employs 2,500 people throughout the area. Other companies, like Meijer and Quality Dairy, also have a presence in south Lansing. In the future, Jackson National Life will also be a part of south Lansing, and provide roughly 150 jobs through the planned relocation of its service center to Pennsylvania Avenue.

Employment by Industry

Just over 29,000 residents in south Lansing are employed, compared to over 48,000 in the city as a whole. Employed residents in south Lansing account for approximately 60 percent of those employed in the city, which is consistent with the population make-up.

As shown in Exhibit 5 on page B-13, employed residents of south Lansing are most likely to work in the health care and social assistance industry (15.5 percent), followed by educational services, public administration, and retail trade (12.2, 11.8, and 10.6 percent). Not surprisingly, these are also among the largest industries in the city as a whole, the county, and state (with exception to public administration in Michigan, which has a significantly lower share of residents employed within the industry).

Nearly 70 percent of Lansing's residents employed within the finance and insurance industry live in south Lansing, and 66 percent of Lansing's residents who work in the public administration and information industries also live in south Lansing. On the lower end of the spectrum, 53 percent of the city of Lansing's residents who are employed in the accommodation and food services industries live in south Lansing.

Employment by Occupation

Nearly 17 percent of south Lansing's employed residents hold occupations in office and administrative support, as seen in Exhibit 6 on page B-14. This share is higher than in the city as a whole and the county (15.7 and 14.2 percent), and significantly higher the state's share (12.9 percent). Sales and related occupations account for approximately 11 percent of the jobs held by residents in south Lansing, similar to the city, county, and state.

Occupational employment in south Lansing exceeds the city of Lansing, Ingham County, and the state in positions which typically require more education (11.2 percent in south Lansing versus 10.2, 9.7, and 8.9 percent in the respective areas). These occupations include business and financial operations, health care practitioners and technicians, and computer and mathematical occupations.

Conversely, residents with blue-collar positions (measured by the sum of the construction, maintenance, production, and transportation occupations) have higher concentrations in the city and state (24.5 and 26.2 percent) when compared to south Lansing (23.8 percent).

There are 2,146 south Lansing residents who hold positions as protective services employees and health care practitioners and technicians. They make up nearly 70 percent of the total city population working in these occupations. Additionally, 68 and 66 percent of Lansing residents with positions in architecture/engineering and business/financial operations (respectively) live in south Lansing.

Emerging and Targeted Growth Sectors

Success stories in Lansing are emerging in several different sectors of the economy, and a majority of new developments observed in south Lansing are in the food and beverage stores, or food services industries. Companies adding an even more significant number of jobs to the Lansing region either through expansion or relocation are found in the professional, scientific, and technical services; advanced manufacturing; and monetary authorities sectors.

South Lansing is home to some of greater Lansing's most modern industrial facilities and advanced manufacturers. The Midway Industrial Park located off of Aurelius Road has experienced significant growth by attracting successful businesses in recent years. These include IDV Solutions, Arctic Glacier, Barnes Aerospace, Symmetry Medical Jet, and Pratt and Whitney, all of whom are well posed for growth into the future. Just north of the industrial park is the Dan Henry Distributing Company, which serves all of mid-Michigan and is planning for expansion.

West of Pennsylvania Avenue, S & S Die Company transferred and located into a former Olofsson Corporation's manufacturing facility, putting what was once a neighborhood eyesore into productive use again. Career Quest is another example of a business that rehabilitated and relocated to an abandoned building. Since their relocation to Pennsylvania Avenue, the learning center has experienced significant growth in enrollment. Along MLK, the opening of Bharat Forge America in 2005 helped to pave the way for smaller investments along the corridor.

There are also projects in the works that are slated for completion in the near future. These include the development of a Nu Union office, to be built on the site of a recently demolished Regent Inn on south Pennsylvania Avenue; the complete renovation of the Causeway Bay Hotel on Cedar Street, formerly a Holiday Inn; the expansion of Potter Park Zoo for a new exhibit; and the relocation of Jackson National Life's customer service center to Pennsylvania Avenue, opening up approximately 150 positions.

III. Retail & Commercial Supply and Demand

COMMERCIAL ANALYSIS

The analyses used to assess supply and demand in south Lansing will be used to inform recommendations for each of the corridors and intersections. The results from this analysis, along with other relevant research, will strengthen the strategies for each area with concrete data. For a detailed methodology of the supply and demand analysis, see “Parameters for Retail Supply-Demand Analysis” on page C-2.

Retail Supply and Demand

In the retail industry, we measure a “gap” or “shortage” in the market to determine opportunity. To do this we look at the existing supply of retail businesses and measure their performance against that of competing areas to identify potential missed sales in specific retail categories. In this section we discuss each of these components.

Trade Areas. As an essential step in our quantitative supply-demand analysis, we have delineated a primary trade area (PTA) and extended trade area (ETA) for south Lansing based on a number of factors and conditions. These include the locations of competing shopping destinations, distribution of population and income levels, physical and socio-economic barriers, transportation networks, and corresponding drive-time distances. The PTA accounts for roughly 70 percent of all retail sales in the south Lansing area, and the ETA accounts for approximately 85 percent. The remaining 30 and 15 percent are accounted for through import.

The eastern, western, and southern boundaries of the south Lansing PTA are represented by the city of Lansing boundaries. The northern boundary reflects the physical barriers of the highway, river, railroad tracks, and REO Town community, as seen in Exhibit 12, "South Lansing PTA, ETA, and Drive-Time Analysis" on page C-6.

We have delineated an ETA to account for customers south of the Lansing boundaries who most likely visit the Cedar/Pennsylvania/Edgewood area for shopping needs, services, and entertainment. The ETA is represented by the PTA plus an extended area to the south, delineated by following major roads and highways, and a drive-time analysis. The ETA, along with the drive-time analysis, can be seen in Exhibit 12, "South Lansing PTA, ETA, and Drive-Time Analysis" on page C-6. A more detailed methodology of the delineation of these trade areas can be found at “Retail Trade Areas” on page C-1.

Supply. Of the retail space in south Lansing, a large portion is comprised of strip mall space with varying quality and some larger shopping centers. According to CB Richard Ellis, the south submarket[1] had about 1.7 million square feet of leasable retail space in the first quarter of 2009 and a vacancy rate of 25.9 percent. Compared to the north, east, and west submarkets, the south submarket had the second highest vacancy rate in this category, and the lowest asking rates ($6-$13). Unfortunately, the south submarket has had a history of high vacancies and tenant turnovers, as evidenced by Logan Square, the old Farmer Jack, and several strip centers along MLK and Cedar Street.

As shown in Table 9, the PTA (south Lansing) is home to over 100 food services and drinking establishments, accounting for 41 percent of those in the City of Lansing as a whole. As observed during the field assessment, there is a higher concentration of limited-service and fast-food restaurants in south Lansing than in Lansing as a whole. The majority of full-service restaurants in south Lansing are found near the Cedar/Pennsylvania/Edgewood intersection.

TABLE 9. Establishments by Industry - 2009

NAICS	Description	South Lansing	Share	Remainder Lansing	Share
722	Food Services & Drinking Places	108	41%	154	59%
812	Personal Care Services	105	55%	86	45%
811	Repair & Maintenance Services	83	46%	97	54%
453	Miscellaneous Retail Stores	49	42%	69	58%
441	Motor & Vehicle Sales	59	59%	41	41%
445	Food & Beverage Stores	41	43%	54	57%
444	Bldg. Material & Garden Equip. & Supplies Dealers	34	57%	26	43%
448	Clothing & Clothing Accessories Stores	27	47%	31	53%
446	Health & Personal Care Stores	22	39%	34	61%
443	Electronics & Appliances Stores	21	48%	23	52%
451	Sports, Hobby, Book, & Music Stores	12	27%	33	73%
713	Amusement, Gambling, & Recreation	13	35%	24	65%
711	Perf. Arts, Spectator Sports, & Related Ind.	10	30%	23	70%
442	Furniture & Home Furnishings Stores	9	33%	18	67%
452	General Merchandise Stores	18	69%	8	31%
447	Gasoline Stations	13	54%	11	46%
712	Museums, Historical Sites, & Similar Institutions	3	16%	16	84%
454	Nonstore Retailers	3	38%	5	63%
	TOTAL	632	46%	753	54%

Analysis: Anderson Economic Group, LLC 2009.
Source: ESRI, Inc. 2009.

1. CB Richard Ellis has defined the south submarket as similar to AEG's delineation of south Lansing, only including REO Town, part of Creyts Road to the west, and into some areas south of I-96 including Holt and Dimondale.

Relative to the rest of the city, south Lansing has a significantly lower share of retail establishments in several retail categories, including museums, historical sites, and similar institutions (16 percent); sports, hobby, book, and music stores (27 percent); performing arts, spectator sports, and related industries (30 percent); and furniture and home furnishings stores (33 percent).

Conversely, south Lansing holds a majority of establishments in the City of Lansing in general merchandise (69 percent, many of which are dollar stores), and over half of all establishments in the motor and vehicle sales; building material and garden equipment and supplies dealers; gasoline stations; and personal care services.

The clustering of these establishments can be seen in Exhibit 8, "Business Clusters in South Lansing—2009" on page C-4. A majority of the businesses are concentrated along the entire stretch of Cedar Street, but there are a significant amount along MLK as well. The following maps in Exhibit 9, Exhibit 10, and Exhibit 11 depict the same businesses broken up into smaller business categories so that clusters can be more easily identified.

Demand. While the supply analysis provides an overview of the concentration of establishments by retail category in south Lansing, it doesn't reveal customers' spending behavior in those categories, one indicator of demand and the basis of comparison for retail potential within the trade area. By comparing Ingham County's retail expenditures as a share of personal income with comparable areas, we can identify retail categories of underspending or export. Exhibit 13 on page C-7 compares Ingham County market shares with the state and analogous counties. If Ingham County's market share is lower than the maximum level achieved by the other areas, then it can be deduced that consumers are either exporting within that retail category, or have simply curtailed spending.

In general, Ingham County residents spent an average share of their income on most retail categories when compared to residents in the state and the counties of Genesee, Kalamazoo, Macomb, and Kent. Ingham County spent a larger share of their income on the book, periodical, and music stores category than any of the other areas, mainly due to the presence of Michigan State University (which is larger than the colleges/universities in the analogous counties). Residents in Ingham County also ate out more than the other areas. On average, 2.4 and 2.7 percent of their income was spent on full- and limited-service restaurants per year. Conversely, residents in Ingham County spent less per year on specialty food stores (0.1 percent) and special food services (0.2 percent).

Because south Lansing is unique from Ingham County, it is crucial to recognize that transacted sales from Ingham County are not a direct reflection of the spending patterns in south Lansing. This is why it is necessary to utilize the supply results of the south Lansing area, our qualitative assessment, the lifestyle clusters, and demographic and socioeconomic characteristics in the area that create the demand, when creating a strategy for south Lansing.

Retail Gap Results. the results from the supply and demand model are presented in square feet for 2010 and 2014. We have conducted the model under a conservative and aggressive scenario. The conservative approach represents the minimal gap in square feet resulting from our model, and the aggressive approach represents the maximum gap in square feet that resulted from our model.

As shown in Table 10 on page 26, our retail supply and demand model found a total of 866,400 square feet of gap under the conservative scenario, and 1,734,500 square feet of gap under the aggressive scenario for 2010. The most notable gaps were found in the performing arts, spectator sports, and related industries; and building material and garden equipment and supplies sectors. Together, the square footage gap from these categories comprise roughly a third of the entire estimated square footage of gap for the ETA. Under the conservative scenario, little to no gap was found in the furniture and home furnishings stores; gasoline stations; clothing and clothing accessories; motion picture theatres; and rental stores.

It is important to note that the supply and demand model does not take into account the current amount of retail space that is currently built out, rather it is an analysis based on transacted sales. Therefore, this gap estimate is not a reflection of retail space that can be supported through additional establishments, but rather through the occupancy of retail space that may already exist, but that is perhaps vacant. More detailed results from the gap model can be found in Exhibit 14, "Retail Gap Results" on page C-8.

Office Space

Largely due to stable government and university related work, office vacancy rates have not experienced the same volatility that other communities around the state have. In the second quarter of 2009, the south submarket had a total of 1.4 million square feet of rentable area, 20 percent of which was vacant. This rate has decreased since the fourth quarter of 2008, in both class A and B space. Of the total rentable office space in the south submarket, nearly 85 percent was classified as class B space. Class C space in each submarket is growing even more undesirable, even with lower asking rates, and vacancy rates are high. In south Lansing, Class C space is nearly 60 percent vacant, which is slightly higher than the average vacancy in that category in the greater Lansing region. Some asking rates in south Lansing were as low as $2.50 on Pennsylvania Avenue, and as high as $19.50 per square foot per year. The average was $11.00.[2]

2. Anderson Economic Group, LLC 2009 analysis of available office space provided by CoStar and CityFeet.com, September 2009.

TABLE 10. Summary of Gap Results for South Lansing ETA - 2010 and 2014

		2010 ETA Gap (square feet)		2014 ETA Gap (square feet)	
NAICS	**Description**	**Conservative**	**Aggressive**	**Conservative**	**Aggressive**
442	Furniture & Home Furnishings Stores	0	21,200	0	23,800
443	Electronics & Appliances	28,200	93,600	31,600	104,800
444	Bldg. Material & Garden Equip. & Supplies	81,100	312,300	90,900	349,700
445	Food & Beverage Stores	61,200	184,100	68,700	206,200
446	Health & Personal Care Stores	22,900	115,000	25,700	128,900
447	Gasoline Stations	1,200	9,600	1,300	10,700
448	Clothing & Clothing Accessories Stores	3,400	9,300	3,800	10,300
451	Sporting Goods, Hobby, Book, & Music Stores	9,900	21,100	11,100	23,600
452	General Merchandise Stores	209,800	255,700	235,000	286,300
453	Miscellaneous Retailers (inc. office supplies)	29,100	50,800	32,600	56,800
512	Motion Picture Theatres	8,400	8,400	9,400	9,400
532	Rental Stores	1,200	1,200	1,300	1,300
711	Perf. Arts, Spec. Sports, & Related Industries	185,200	325,400	207,500	364,500
712	Museums, Hist. Sites, & Similar Institutions	21,100	21,100	23,600	23,600
713	Amusement, Gambling, & Rec. Industries	156,000	216,800	174,700	242,700
722	Food Services and Drinking Places	36,900	40,600	41,400	45,500
812	Personal Services	10,800	48,300	12,100	54,100
	TOTAL	866,400	1,734,500	970,700	1,942,200

Source: Anderson Economic Group, LLC 2009 analysis of U.S. Census of Retail Trade data, 2002.

IV. Community Engagement

To gauge community interests, wants, and needs we used surveying, in-person meetings, a focus group, and informal discussions with community members. The focus group was held in south Lansing on August 6th, and the survey was conducted online between June 24th and August 28th. In-person meetings were held with community stakeholders, city council members representing the area, and leaders in the business community.

BUSINESS COMMUNITY FOCUS GROUP SUMMARY

There were 23 participants at the focus group, all of whom are from the business community in various areas of south Lansing. Many of those who attended are also members of the south Lansing Business Association (SLBA) or the On the Boulevard organization.

The below is a summary of general observations during the focus group. A full description of the focus group methodology and a detailed summary of what we heard is offered in Appendix A: Community Engagement on page A-1.

- Many of the participants were surprised that nearly 60 percent of the Lansing population resides on the south side.
- Participants frequently mentioned south Lansing's proximity to major transportation networks, such as I-96, 496, 127, and arterial north/south connectors like Cedar Street, MLK Boulevard., and Pennsylvania Avenue. Participants viewed these as some of the area's greatest strengths.
- Area strengths observed included south Lansing's proximity to major institutions such as Michigan State University and Ingham Regional Medical Center, and attractions such as Potter Park Zoo and the Edgewood Boulevard shopping center.
- When asked what some things were that should not be changed in south Lansing, attendees mentioned the diversity of the community, schools and public services, and the businesses that are currently in the area.
- One common theme throughout the session focused on the physical improvement of transportation networks.
- Many participants expressed a desire to see better maintenance of buildings and properties along major corridors, reuse or demolition of vacant buildings, implementation of security features for businesses, and corridor beautification.
- A few attendees mentioned the lack of a town center/square, place of identity, or gathering area.
- Results from an interactive exercise revealed types of businesses that attendees would most likely invest in (in south Lansing) had they an opportunity. These included (in order of popularity) mid- to high-end restaurants, 'fresh' fast-food, home improvements/furnishing stores, grocery or specialty food stores, and entertainment venues. No attendees expressed an interest in personal/home services, and very few in electronics/appliance stores, and sporting goods/hobby/book stores.

IN-PERSON MEETINGS

In-person meetings were held with two city council members plus one former council member, and several other stakeholders in south Lansing. Some of the most frequently mentioned concerns that were touched upon in each of these meetings were:

- Accessibility of businesses to non-motorized traffic, most significantly near the Cedar/Pennsylvania/Edgewood intersection;
- Glut of vacant buildings (inc. former Farmer Jack's, Logan Square) along major corridors, many with undesirable formats with deep setbacks for parking;
- Lack of commercial/rehab code enforcement, leading to degrading properties and little effort to maintain appearance and beautify property;
- Maintaining/increasing the industrial base that is going to help create the demand for the retail and service offerings in the area;
- Pre-conceived ideas about the safety of south Lansing contribute to the myths about south Lansing; debunking these myths is an important step in attracting and retaining businesses and residents.
- Lack of sense of identity; there should be a sense of arrival when entering south Lansing.

ONLINE SURVEY

The online survey was open to all participants, with announcements about its availability made through neighborhood associations, local media coverage, the LEDC's web site, Lansing State Journal, follow-up e-mails to focus group participants, local business associations' meetings, and through social networks' online applications and blogs, such as the Grand River Connection and Develop.MetroLansing.

There were three surveys aimed at the business community, residents of south Lansing, and others interested in the economic development of the area. A total of 150 completed surveys were received. A summary of the findings is below, and the complete results are available in "Online Survey" on page A-5.

Business Community

Respondents from the business community were asked to respond to seven questions that focused on the business climate in south Lansing. Of the 21 responses received, the majority (13) owned/ran businesses that were located nearest to Pennsylvania Avenue, four near Cedar Street, and two each from businesses nearest MLK and Waverly. Below is a summary of their responses.

- A majority of respondents felt that some of the conditions in their area of business, most notably blight and vacancies, road networks and connectivity, perceptions of the area, and safety issues and areas of loitering, were having a negative influence on the success of their business.
- When asked if they agreed with the statement "Vandalism, shoplifting, and crime is a current problem for my business," 14 of 21 respondents either strongly or somewhat agreed, and 7 somewhat or strongly disagreed.

- When asked about the use and availability of business to business services, such as janitorial, office supplies, computer repair, and other services, most respondents were either aware of the services in the area and/or used those services. Legal services was the only category in which some respondents were aware of the local availability and attained them elsewhere.

Residential Community

Residents of south Lansing responded to 8 questions and a total of 83 responses were collected. The majority of respondents lived closest to the Cedar/Pennsylvania/Edgewood intersection (39), followed by the MLK/Holmes intersection (31), Pleasant Grove/Holmes (7), and Waverly/Jolly (6). Below is a summary of their responses.

- An overwhelming majority of responses indicated that they visited the Cedar/Pennsylvania/Edgewood intersection at least a few times per month for shopping and service needs (79 of 83). The MLK/Holmes intersection was the next most frequently visited intersection for those needs (50 of 83).
- A majority of respondents indicated that the top two reasons for leaving south Lansing were to dine at restaurants (89 percent leave more than once per month), and casually shop (87 percent).
- A large number of respondents were satisfied grocery and produce offerings, fast-food, office supplies, and hardware and home improvements stores; but were largely unsatisfied with the quality and availability of fine-dining and upscale restaurants, apparel and shoe stores, salons and spas, and sporting goods and book stores.
- When asked about important elements for the revitalization of each of the four intersections, the most frequently mentioned element was the reuse of vacant buildings and clean-up/better maintenance of properties, followed by better shopping and restaurant choice and quality, and improved pedestrian/bicyclist access and traffic patterns and safety. Better shopping and restaurant choice and quality was most frequently mentioned as being important for the Cedar/Pennsylvania/Edgewood intersection.

Other Interested Parties

There were a total of 46 respondents who were neither a resident of south Lansing, nor a business owner/operator, but who were interested in the development efforts of south Lansing. Below is a summary of respondents’ answers to the seven questions, which focused on important elements of revitalization for each of the identified intersections.

- Over half (32) of respondents reported visiting south Lansing regularly to visit family and friends. A majority of respondents reported rarely visiting the area for coffee/bakery/deli shops, salons/spas, book stores, sporting goods stores, and furniture and home furnishings stores.
- Nearly half of respondents reported regularly visiting south Lansing for mid-priced and family restaurants, 17 regularly visit for hardware and home

improvements stores, and 14 indicated regularly visiting the area for entertainment venues, and personal care and pharmaceutical stores.

- Respondents most frequently cited the reuse of vacant buildings, and clean-up and maintenance of properties as being important elements for revitalization at the Waverly/Jolly, and Cedar/Pennsylvania/Edgewood intersections. The improving of traffic patterns and access for non-motorized traffic, as well as better shopping and restaurant quality and choice were also cited as elements of importance for the MLK/Holmes, Waverly/Jolly, and Cedar/Pennsylvania/Edgewood intersections.

V. Strategy Recommendations

Based on our analysis, market visits, and feedback from the public and area businesses, we have documented specific challenges that south Lansing faces. We have also identified a number of strengths and assets within the community that can be leveraged to address the weaknesses and challenges. From this, we developed recommendations for south Lansing as a whole, and for specific intersections within the area, that address weaknesses and seize on opportunities for improving south Lansing retail and commercial economic climate.

OBSERVED CHALLENGES

A number of economic development challenges became apparent throughout our analysis, site visits, and interviews. These items were brought up regardless of which intersection or corridor we were focusing on, and were common topics raised by residents and businesses alike. These challenges can be summarized as:

- Incongruous land uses and unplanned development, and a lack of well defined commercial and neighborhood centers, making it difficult to discern one part of south Lansing from another.
- A perceived and observed lack of commercial code enforcement.
- Underutilized and vacant commercial properties throughout the area.
- A lack of exterior maintenance, both by property owners and the city, in large sections of south Lansing, impacting beautification efforts and overall curb appeal.
- Poor road conditions.
- Perceptions that the whole of south Lansing is not safe due to criminal activity.
- A lack of diversity and clustering for retail and dining in the area.
- Poor transportation network for non-motorized traffic, especially pedestrians and bicyclists.

STRENGTHS AND ASSETS

South Lansing also has a number of strong points that make it a dynamic and attractive place, both for residents and businesses. Specific strengths that can be built on to further develop the area are:

- A strong population base, as the area is home to nearly 60% of all Lansing residents.
- An affordable and quality housing stock, offering a range of residential options to those wishing to live in the area.
- Regional destinations, like the Potter Park Zoo and the IMAX Theatre, which serve to draw in visitors from around the region.
- Close proximity to several of the state’s largest employers, including the State of Michigan and Michigan State University, both of which provide relatively secure employment and are less impacted by economic downturns than many private sector businesses, like General Motors.

- Proximity to major transportation networks, including interstate freeways, rail networks, and the Capital Region International Airport.
- Observed and quantified “gaps” between the available supply of retail business and the level of demand the area’s residents can support, suggesting an opportunity for new retail businesses to open in the area.
- A wealth of park space and outdoor recreational offerings, including trails, the river, and events.
- A recent track record of investments by new and existing businesses, such as the ongoing renovations at the Causeway Bay hotel; the opening of Bharat Forge America; and the construction of new facilities by Nu Union Credit Union.
- A growing number of active neighborhood associations and business groups, including the recently formed “On the Boulevard” business association.

MARKET WIDE RECOMMENDATIONS

There are a number of steps that can be taken throughout south Lansing to address a number of the documented issues. These include:

1. *Adopting strategies to address vacant properties*

It is well know that vacant properties are very likely to be poorly maintained, become vandalized, and turn to a state of disrepair that negatively impacts neighboring properties. Effectively dealing with vacant properties positively impacts the overall community, and can also help a city assembly and reuse properties for higher and better uses.

The first step in addressing vacant retail and commercial properties should be creating an inventory of such properties, identifying who the owners are, and checking to see the status of tax liabilities on the property. For properties where significant back taxes are due, the city should immediately proceed with the steps necessary to get a tax foreclosure on the property. Once that step is complete, the city can then work on repurposing the property, preferably for a use consistent with the master plan currently being developed. Along with this, the city should formulate a strategic demolition policy, which would identify the types and locations of properties that demolition and other such funds should be targeted towards. Stable and tranisitional neighborhoods and commercial centers should receive priority in such a policy, as these are areas where vacancies can have the greatest negative impacts.

For vacant properties where tax foreclosure is not an immediate option, or a desired outcome, the city can use other tools, including:

- A vacant property registration ordinance. Such an ordinance would require owners of vacant properties to register their property as vacant with the city after a specified period of without occupancy. This provides the city with accurate contact information for the owner, facilitating contact should an incident occur with the property. The registration may also carry a fee, especially if the property remains vacant for more than one year. These fees can be set on a sliding scale, increasing over time, and be used to help cover the costs associated with monitoring and inspecting the property.
- A property owner accountability campaign. The intent of such a campaign is to show property owners, particularly those who are absentee, that they commu-

nity intends to establish and uphold a standard for property maintenance and appearance. The campaign can begin by identifying owners of vacant or unkempt properties, and inviting them to a community or business association meeting called specifically to address to topic of vacant properties. Landlords who participate should be encouraged to agree to a set of specific maintenance and repair standards for their properties, and others in the area. The group may then consider publicizing the names of property owners who are not willing to participate, and keep in communications with them to stress the importance of the issue to the community.

- Active enforcement of city codes. This is discussed in more detail in the following section.
- Using incentives to attract new businesses to specific areas where greater density is desired, thus stimulating more demand for property. The city can consider granting property tax abatements, offering matching relocating funds, or providing other incentives to encourage businesses to move from one area to another. While this admittedly only transfers vacancies within the community, it can help to create density and be used to consolidate business activity in targeted areas. It can also be used to strategically create vacancies in areas that should be razed for new development.

2. More strongly enforcing city codes and ordinances to improve property maintenance, appearance, and to combat vacancy and absentee landlords.

Our review of the Lansing Codified Ordinances found specific ordinances that, if more regularly and strongly enforced, would help to improve the visual appeal of commercial and retail corridors in south Lansing, and also address come vacancy and absentee landlord issues. This enforcement should be implemented with direction. Forming or assigning a small committee, perhaps the "economic growth nuisance board," to create a checklist of codes and ordinances that should be more strongly enforced as a means of improving the retail and commercial business climate in the city would be a good first step. The next step would be to designate enforcement responsibilities, and to identify geographic areas within south Lansing that should receive the attention of enforcement agents.

Specific ordinances and codes that, if more strongly and regularly enforced, would improve the retail and commercial climate in south Lansing include:

- Chapter 856, under Part 8, Title 2, addresses secondhand dealers, more commonly know as pawn shops. A number of pawn shops are found throughout south Lansing, contributing to perceptions of criminal activity being prevalent in the area, and often times operating in facilities that appear not well maintained. The city code requires these businesses to be licensed and to follow well defined procedures for reporting and tracking transactions. These codes are designed to discourage the sale of stolen items, and if strongly and visibly enforced, would do more to convey that the area's secondhand dealers only conduct legitimate transactions.

  The code can also be used to improve the visual appearance of secondhand dealers. Specifically, part 856.09 says "Any establishment operated pursuant to this chapter shall be kept in as neat and orderly a condition as the conduct of the business will permit. No person owning, operating or in charge of such an establishment shall allow any secondhand goods or merchandise to be displayed or stored outside of the building." The vague nature of this provision may make it difficult to enforce, but the city could document conditions at one or two model businesses, and use those shops as a benchmark for what other secondhand dealers have to meet. This method would make it difficult to challenge the "as the conduct of the business will permit" element of the code.

- Chapter 655 in Past 6 of the codified ordinance addresses nuisances, and has the stated purpose of promoting "the public health, safety and welfare of residents of the City and to provide for the removal and abatement of unhealthy, noxious or dangerous substances, structures and conditions, at private expense." A number of south Lansing's vacant and poorly maintained retail and commercial properties likely present some form of public nuisance, and enforcing this code can help to either have the nuisance addressed, or help the city to obtain liens on the properties, moving them to foreclosure, and creating opportunities for land-banking the properties to encourage reuse.

  Among the specific nuisance conditions covered in the code, there are several which are likely to apply to a number o vacant or poorly maintained properties in south Lansing. These conditions include:

  — "The accumulation of water causing mosquito... breeding"

  — "Rodent or insect infestation"

  — "The growth of noxious weeds or plants which are about to spread or mature seeds"

  — "The accumulation of bees, fowl, bats, wasps or other venomous pests... as to create a condition that many be injurious"

  — "Hazards, such as... unsecured vacant structures"

  — "A violation of any of the provisions of Chapter 1060 (Garbage and Rubbish Collection and Disposal)"

  — "A violation of any of the provisions of the Zoning Code"

  Enforcement of these ordinance will promote and encourage owner and tenant maintenance and upkeep. For those who do not comply, the ordinance allows for fines and penalties to be assessed, added to the property owner's tax bill, and may ultimately result in a quicker tax foreclosure on the property.

- Chapter 1442 of Part 12 covers signs. The purpose and objectives of this chapter align strongly with the desire to have an aesthetically pleasing, safe, and strong business and commercial retail climate. The first objective listed in the section reads "to protect and promote the aesthetic quality of life within the City."

  Our observation is that, in some areas, business signs are actually deterring from the aesthetics, safety, and overall business climate in south Lansing. Enforcement of this section of code will encourage businesses to improve their appearance, property owners to remove improper and abandoned signs, and may result in some property owners being subjected to fines and costs that encourage them to sell the property to someone willing to invest in its improvement.

  Specific elements of this section of code we see as being immediately applicable include:

  — Section 1442.07, which calls for the removal of unsafe, dangerous, unlawful, or abandoned signs. An abandoned sign is any sign "still on the premise six months after a business ceases to operate of moves from the location." A number of such signs are found throughout south Lansing, and detract from the visual appearance of the area.

— We also observed that section 1442.15 permits window signs in most non-residential districts, but does little to regulate such signage. However, section 1442.24 of the code, which sets separate sign regulations for the capitol center district, prohibits window signs from exceeding more than 20 percent of the window area. This could be extended to apply throughout the City. Alternatively, if could just be extended to apply to retail outlets with liquor sales, as the visual appearance of liquor stores throughout south Lansing is often negatively impacted by the large number of signs placed in the windows and glass doorways.

3. Making use of overlay zoning and roadway classifications to align land uses along major corridors

This will help to bring continuity to the area, encourage business activity to cluster in target areas, add density, and create streets and roadways that can be scaled to fit actual uses. Below are summaries of these implementation tools.

Overlay Zoning. Overlay zoning, which is placed over an existing zone base, creates a special zoning district that identifies special provisions in addition to those in the underlying zoning base. The overlay district can cut across base zone boundaries, or share common boundaries. This tool is useful in guiding the development within identified areas, and is helpful in discouraging specific types of development. When creating an overlay zone, there should be defined boundaries, purposes, and provisions for the district. Every piece of property within the district must abide by the same requirements. The city should clarify the purpose of the district to the public, as well as property owners who will be affected.

Examples of this can be seen in:

- Oshkosh, Wisconsin, where the overlay zone regulates building architecture, orientation, and setbacks, as well as signage, utilities, waste storage, and driveways; and
- The City of Green Bay, Wisconsin where an Urban Parking Overlay District was adopted as a part of a redevelopment effort to encourage building reuse and infill. This district allows structures to share parking area and receive parking credit for available stalls within a given distance from a building.

Roadway Classifications. Adopting a roadway classification system that reflects intended roadway uses offers a clearer approach to planning. Roadways have traditionally been classified as arterials, collectors, or local streets, based on factors such as traffic volumes, traffic speeds, land uses, and the number of lanes. Classifying roads by these designations is not always helpful for neighborhoods, though. As south Lansing plans for its future, it should think differently about its roadway system and how the streets can benefit the neighborhood.

There are currently three distinct types of roadways in south Lansing; high vehicular volume streets with primarily commercial land uses, medium vehicular volume streets with primarily residential land uses, and low vehicular volume streets with residential land uses. We believe that this presents an opportunity to create a roadway classification system that is easy to implement. Each of the classifications, their descriptions, and the roadways they apply to, are described below.

- Commercial Corridors—These are segments that currently are or are planned to be strictly commercial in nature. These roadway segments should encourage commercial activity by moving traffic efficiently on the corridors, allowing for safe and efficient ingress and egress at the access drives, and good exposure for the businesses. Efforts should be made to add as much landscaping to the area to help reduce the amount of unused asphalt. There are two segments in south Lansing that fit this description perfectly; almost all of Cedar Street and Pennsylvania Avenue, south of Jolly Road. Martin Luther King Jr. Drive, from Cavanaugh north to the railroad crossing, should also be considered a commercial corridor.
- Residential Boulevards—South Lansing has a number of roadways that carry traffic volumes in excess of 15,000 vehicles a day but also serve primarily residential land uses. These roadways should be treated as residential boulevards. They should allow vehicular traffic to move efficiently, but at lower speeds. These roadways should encourage pedestrian activity through controlling vehicle speeds with traffic calming, wide sidewalks, landscaped medians, and dense tree coverage.

  Pennsylvania Avenue north of Jolly Road, Jolly Road, Martin Luther King Jr. drive south of Cavanaugh; and Martin Luther King Jr. drive north of the railroad crossing are roadways that should be planned as residential boulevards. Pennsylvania already has a number of the features describe above. Consideration should be given to reducing the number of lanes on Jolly Road from four to three, constructing a landscaped median, and creating a much better environment for pedestrians. Waverly Avenue should also be considered for a residential boulevard treatment.
- Green Streets—The remaining streets in south Lansing almost exclusively serve local, residential traffic although there some neighborhood retail land uses located at the signalized intersections. We believe that there is a unique opportunity to create a system of green streets in south Lansing where all users of the road are given equal priority and balance. The focus of these streets should not be on moving traffic, but providing balanced connections for cars, pedestrians, and bicyclists.   They should promote low vehicular speeds and encourage bicycling and pedestrian activity. Four-lane roadways should be re-configured to three-lanes or two-lanes with a bicycle lane or wider sidewalks. Pedestrian crossings at intersections should be safe and well-defined.

  There are a number of connections that these green streets will make in addition to the residential neighborhoods. Creating a green street system will make it easier for residents to walk or bike to the Grand River, Potter Park, Sycamore Creek, and the other recreation amenities that are provided in south Lansing. The roadways that should be considered for the green street system are Miller Road, Mount Hope Avenue, Pleasant Grove Road, and Holmes Road. Pleasant Grove Road already has a bicycle lane and is an excellent example of the potential of the green street network.

4. Establishing Corridor Improvement Authorities, Business Improvement Districts, and/or Business Improvement Zones

Corridor Improvement Authorities (CIA). Similar in nature to downtown development authorities, a corridor improvement authority will allow the city to create a district along an older commercial corridor and capture funding for capital improvements for public or private use. Funding can be secured through the creation of a tax increment financing plan, by levying special assessments, or the sale of bonds. Establishing a CIA along Cedar Street would be beneficial to the business community, have a positive impact on surrounding areas, and combat negative perceptions of the area. Furthermore, establishing a CIA along Cedar Street may be more practical than a BIZ, as many of the retail businesses located there are national brand tenants with corporate standards to abide by.

Business Improvement Districts (BID). BIDs are created by a city with the goal of revitalizing a designated commercial area. Funding is secured through grants and gifts, city funds, revenue bonds, general obligation bonds, special assessments to be used for the improvement of roadways, pedestrian walkways, and parking; acquisition, maintenance, demolition, development, or operation of properties and structures; the development and operation of public wayfinding elements; promotion of economic development; and operation of security. BIDs also help establish commercial district identities and create more organized and identifiable centers of retail and commercial activity. We discuss this in more detail later in this section, when we offer specific strategies for key intersections in south Lansing.

Business Improvement Zones (BIZ). Through a petition and election process, a city may establish a BIZ to fund improvement projects which will benefit the businesses in the zone. Effectively, BIZs are short-term BIDs, adopted by the property owners in the zone. Capital improvements are funded through grants, gifts, special assessments, and loans. We discuss this in more detail later in this section, when we offer specific strategies for key intersections in south Lansing.

These districts work best in areas with significant local business ownership, as opposed to areas with a large presence of national chains. Local business owners are more likely to become and stay involved, while national chains often already receive the support provided by such districts from their parent organization.

5. Pursue economic development and business attraction

The LEDC should pursue economic development and business attraction efforts that build on and leverage south Lansing's unique and established assets. This includes its location and proximity to important transportation routes, its parks and outdoor recreation space, and its regional destinations like the Potter Park Zoo and the IMAX Theater.

South Lansing’s proximity to major transportation routes, along with relatively inexpensive office space, makes it an attractive location for professional service firms, such as architects, engineers, landscape architects, and accounting firms.

Such businesses typically have multiple employees who travel to serve their customers. South Lansing's proximity to I-96 and US-127 provides these businesses with easy access to regional markets, like Grand Rapids, Kalamazoo, Battle Creek, Detroit's western suburbs, Jackson, and Mt. Pleasant. This locational advantage is quite unique to south Lansing, and should be capitalized on in economic development efforts.

South Lansing's proximity to major transportation routes not only makes it attractive to businesses looking to locate centrally to multiple markets, it also makes it an area that can host events and venues which are designed to draw visitors from other markets. Two good examples are the Potter Park Zoo and the IMAX Theater. Additionally, the Causeway Bay Hotel (formerly the Holiday Inn South) hosts a number of conventions and association meetings, and events like the Hawk Island Triathlon have demonstrated an ability to draw participants from outside of the Lansing area.

By drawing visitors to the area such venues and events bring new spending to the market, creating true economic impacts. To do more of this, the LEDC and the Lansing Regional Convention and Visitor's Bureau should bring together south Lansing businesses and organizations that can benefit from increased visitorship and develop a strategy for leveraging these assets. Parties to consider involving are the Causeway Bay and Days Inn Hotels, Potter Park Zoo, the IMAX Theater, and representative's from Lansing's parks and recreation department.

6. Make pedestrian- and bike-oriented improvements

One common transportation goal that should be consistent throughout the neighborhood and with all new projects is to make the transportation system more walkable. Whether it is creating pedestrian space in an off-street parking lot, reducing the crossing distances at signalized intersections, or creating a better buffer between the street and the sidewalk, all projects should be reviewed to ensure they are encouraging pedestrian activity. The recently adopted "Complete Streets" program is an excellent step in this direction.

In order to encourage more bicycling in the neighborhood, the existing bicycling infrastructure in south Lansing must be improved. This includes more bicycle lanes (which can be incorporated with Green Streets), bicycle parking, and innovative bicycle striping and signing. Anything that makes bicyclists feel more comfortable on the road and makes drivers alert to the presence of bicyclists will increase the number of people riding bikes.

There also exists the opportunity to create a green trailway from Wise Road, near the Hill Center, east to Pleasant Grove, MLK, South Washington, Cedar, Pennsylvania, and perhaps even north to cross Jolly and stretch for Hawk Island Park and the Lansing River Trail. Aerial photos suggest a utility line and service road currently runs from Wise Road, all the way east to Pennsylvania. Securing the right-of-way for using this long stretch would allow the city to create a green trail for walkers, bicyclists, and other non-motorized traffic to travel across a large portion of South Lansing with minimal encounters with motorized traffic. This utility and service road extends just east of Pennsylvania, seemingly ending at Enterprise Drive. In this area there appears to be undeveloped property to the northeast that, if properly accessed, could allow the trail to extend to Jolly Road, and follow the railroad tracks north to connect with Hawk Island and the even the Lansing River Trail.

7. *Improve traffic flow and intersection safety*

Roundabouts have been proven to be a much safer alternative to signalized intersections. They have demonstrated, when designed appropriately, the potential to reduce the number and severity of accidents, particularly left turn collisions. There are a number of roundabouts throughout Lansing and the state of Michigan. A number of intersections in south Lansing would be good candidates for conversions into roundabouts, particularly at the neighborhood retail nodes.While roundabouts often encounter public opposition, we have found this caused largely due to unfamiliarity with the ease by which they can be used, and once the public begins using them, the adapt quite quickly to the concept.

8. *Adopt smart-parking requirements*

The existing parking requirements in south Lansing have resulted in many parking lots that have more empty parking spaces than occupied ones. This is not the intent of minimum parking requirements. As new development and redevelopment of existing sites occurs in south Lansing, we believe that the neighborhood and the City should take a different approach to parking. Instead of using a minimum requirement, developments should demonstrate their actual parking need based on actual parking data. This will help to provide a more accurate estimate of parking demand and minimize unnecessary costs for the development. Ensuring that parking supply accurately meets parking demand, as opposed to being far in excess, will have a number of benefits for south Lansing. It will allow more land use and site design flexibility if developers are not required to provide parking they don't need. Prices for goods and services are reduced as money is not being spent on an underutilized item. And, it is better for the environment to provide less pervious surface due to the negative effects on urban heat island and water run-off.

To ensure problems do not arise, parking management strategies should be developed to accommodate those events when parking demand does exceed supply. This may mean something as simple as land banking parking for the future or developing a shared parking agreement with an adjacent property owner. South Lansing's best interests are not served by allowing parking to dictate the size and type of development in the area.

9. *Create additional community and "third places"*

In community building, the term "the third place" is often used to describe the social surrounding or environment that is separate from the usual two other places (home and work). Ray Oldenburg, an urban sociologist, coined this term and argued that third places are essential to establishing a sense of place and vital to current societal needs. As he describes them, the third place is an anchor of community life and facilitates and fosters a broader, more creative interaction. These places could be informal meeting places and are usually free or inexpensive. While not essential, food and drink offerings, and location and accessibility are important. These places involve regulars-people who habitually congregate there-so proximity and walking distance to these establishments is important.

INTERSECTION SPECIFIC CONDITIONS AND RECOMMENDATIONS

Our work also focused on specific intersections within South Lansing. Below is a summary of the conditions most prevalent for each, and our related recommendations.

Cedar, Pennsylvania, and Edgewood

Conditions. Specific conditions for this intersection are:

- Concentration of big box retail, regional and national brands, and movie and IMAX theatre that attract shoppers and visitors from the Lansing region
- Excellent freeway access to I-96, 496, 127, and 69; but an unfriendly ramp configuration that can be confusing and dangerous for motorized and especially non-motorized traffic
- Vacant commercial space and excess parking inventory
- Retail and entertainment diversity that promotes cross-shopping and longer visits to the area
- Concentration of hotels, encouraging visitor stays and helping generate tourism

Strategies. Strategies to address these issues include:

1. *Creating a Gateway at the I-96 Interchange:*

There is the potential to create a remarkable gateway at the I-96 interchange at Cedar Street and Pennsylvania Avenue. The potential exists to transform the existing interchange into an area that is safe for all users, easy to understand, and aesthetically pleasing. New signage and beautification would also help to brand the area, and welcome visitors to south Lansing, or “South Town.” However, to accomplish this major changes are necessary to the ramp designs.

We believe that the solution that accomplishes all of the listed goals is to construct two roundabouts at the off-ramps intersections with Pennsylvania Avenue and Cedar Street, as shown in Figure 5 on page 41. This would create a number of benefits to both the drivers and the neighborhood. The roundabouts solution will significantly improve the safety for all users in the area and makes it much easier for drivers to figure out where they want to go. It would also make it safer for pedestrians and encourage walking in the area. The existing ramp configuration takes up a lot of space with all of the ramps. The roundabouts consolidate these roadways and allows for a significant increase in the amount of usable green space. This green space could be used to make an aesthetic gateway that helps brand south Lansing in a positive manner.

There are similar vehicular safety and operational concerns at the intersection of Cedar Street and Pennsylvania Avenue. We believe that this area could be improved with roundabouts as well, but more data is necessary to come to a firmer conclusion.

FIGURE 5. Reconfiguration of Cedar/Pennsylvania/Edgewood w/ Roundabouts

Source: Sam Schwartz Engineering, 2009.

2. *Acquisition and Transformation of Abandoned Structures and Properties:*

There are a number of abandoned and blighted properties near this intersection that are in violation of city ordinances, and some of which appear unsafe. These properties are generally north of Edgewood Shopping Center near Miller Road. The LEDC should take advantage of the Obsolete Property Rehabilitation Act (OPRA) to assist in their redevelopment and put them into productive use.

One such property—a vacant gas station— is on the southeast corner of Miller and Cedar, and presents an opportunity to rehabilitate and repurpose the structure. A Lansing *Capital Gains* article (8/12/2009) poses questions about how to reuse such vacant properties. Although not easy for former gas station sites, we agree that the clean-up and repurposing of some of these sites would be beneficial to the corridor and area neighborhoods. These particular sites could serve useful purposes as wireless Internet cafes, future locations for a business association or community organization, or coffee shops and WiFi hotspots. The former gas station is located next to a bus stop and directly across the street from a residential neighborhood that may benefit from Internet access, making it an ideal location for one of these uses. Examples of converted gas stations are shown in Figure 6 on page 42.

FIGURE 6. Converted Gas Stations

From top left, clockwise: Get Bento, location unknown; Blue Collar Joe's, Philadelphia, PA; Copper Star Coffee, Phoenix, AZ; City Cafe, Kitchener, Ontario, CAN.

3. *Creating Green Space, Implementing, and Improving Pedestrian Walkways:*

Pedestrian Sidewalks and Walkways. There are several areas at this intersection which would benefit from improvements for pedestrians. The implementation of wide sidewalks will improve safety in the area and encourage non-motorized traffic. These measures will be especially effective if implemented along with roundabouts, as recommended by Sam Schwartz Engineering. More specifically:

- Sidewalks are non-existent along the east side of Cedar Street between the city limits to the south and heading north past the Edgewood Shopping Center. There is frequently foot traffic along Cedar Street, so the addition of sidewalks along this busy commercial corridor would be in the public's best interest. This would also better connect the Causeway Bay hotel and the Days Inn hotel with area businesses, encouraging more foot traffic and shopping by visitors.
- We recommend the addition of well-marked crosswalks along Edgewood Boulevard between Cedar Street and the Willow Wood Apartments near American Drive. Additionally, we believe that pedestrians and businesses will benefit from the addition of a walkway along the drive into the Edgewood Shopping Center near Target. Currently, pedestrians who walk to the shopping center must scurry past Edgewood Boulevard, only to reach a parking lot which must also be crossed in order to reach their destination.

Green Spaces. One way to connect the community in the area, and to strengthen the area's identity, is to create green spaces by converting unused parking. There are two such areas near this intersection which could be utilized for public space:

- The north side of the Target parking lot, just west of the Steak 'N Shake, is not used to park cars. Though an agreement with the current property owner would be necessary, we believe that the conversion of a portion of this parking surface area into green space would be beneficial to the area as a measure of beautification and traffic calming for drivers that may speed and weave across the parking lot. It will also provide a "third place" for those visiting the shopping center, encouraging more families to visit the area together—mom can shop while dad or grandma play with the kids in the park.

  A more aggressive option would be to acquire the property on the southwest corner of Cedar and Edgewood, extending west to Amwood, for use as a larger park space. Currently a National City Bank and Young Automotive occupy the site, though large portions of the property appear sparsely used. Converting this larger parcel to greenspace would provide the community with a park, a gathering spot, and an area for entertainment, such as summer concert series, a beer garden, a winter ice-skating rink, outdoor movies, and other such events.
- The northwest side of the Meijer parking lot, which abuts the abandoned gas station on the northeast corner of Cedar and Miller, is also not utilized for parking as it was intended. If feasible for the city, implementing green space here would turn an eyesore area into an aesthetically pleasing pocket park, which could potentially be integrated with the adjacent gas station once it is put back into productive use. This space, if acquired and converted to public space, would also present those entering the area from the north with a visually appealing first impression. Furthermore, these measures would lessen the impact of the impervious parking surface, and allow drainage for water runoff.

If implemented, these ideas would be best preceded by traffic calming measures and traffic improvements, as recommended by Sam Schwartz Engineering. Examples are shown in Figure 7 on page 44.

4. Infill Development and Building Reuse:

Recognizing that building on underutilized sites in existing business and population centers can pose a number of problems that building on open land does not, the city can identify these priority sites for redevelopment and provide necessary background research on the sites to assist in their development. Tax liens and other information on blighted or abandoned properties that have been identified through an abandoned land inventory can assist developers in their infill development efforts. Another way to encourage infill development is to streamline the permitting process and waiving requirements that make infill development difficult. For example, the city could waive road-frontage requirements so as to allow site access via shared driveways.

A number of properties in Edgewood Towne Center present opportunities for infill development and/or building reuse. South Lansing residents, as well as those living outside of Lansing expressed dissatisfaction with higher quality, full-service restaurants. The city should work to actively recruit such tenants to this intersection, providing more dining options for residents, as well as for the many visitors to the area. The clustering of restaurants at this intersection will give visitors another reason to stay in the area, and residents a reason to play in their own hometown. The former Courtesy Ford and Denny's businesses are examples of buildings that could be rehabilitated for full-service restaurants. National restaurant chains, such as Olive Garden, Chili's, and Red Lobster are examples of high-quality, full-service restaurants that would do well in this area. A Buffalo Wild Wings is an example of a national chain restaurant that could locate near Edgewood Shopping Center through new infill development (along Edgewood Boulevard) and bring more activity to the area. Furthermore, Buffalo Wild Wings has been and is continuing to expand in markets throughout the Midwest. The location of high-quality, full-service restaurants to this intersection will also increase the attractiveness of an outdoor community entertainment venue.

Another such area is along American Road behind WILX to Menard’s. This property well-positioned for automobile dealerships, which would benefit from the existing cluster of auto dealer and service and repair businesses in the area, and from the freeway visibility. Examples of businesses that might benefit from a relocation include Paradise Motors, Cedar’s Auto Sales, and O.K. Auto Mart on Pennsylvania Avenue. This would also help bring an identity to the area, much like has happened with the “Motor Mile” in Battle Creek.

FIGURE 7. Examples of Community and Entertainment Space

From top left, clockwise: community space, location unknown; Liberty Park, Marshall, MN; Pioneer Park, Dunedin, FL.

5. Use of Overlay Zones for Design Standards:

The LEDC should work with business owners to establish an overlay zone for this area. A set of design standards for future business investments (either through the reuse of buildings or new developments) should be established and address signage, facades, parking, windows, building angles, and other important elements of building design.

MLK and Holmes

Conditions. Specific conditions for this intersection are:

- Vacancies in Logan Square shopping center and in surrounding establishments
- Low density commercial layout and poor configuration of buildings
- Lack of identity and/or brand

Strategies. Strategies to address improve these conditions include:

1. Establishing a Business Improvement District or Zone (BID/BIZ):

The LEDC should work to establish a BID or BIZ that encompasses the intersection and extends to the outer commercial areas. This will allow for the capturing of funds for the improvement of properties, roads, and pedestrian walkways; acquisition, demolition, and improvement of structures, and provision of security, among other things. Businesses inside and outside of the BID or BIZ will benefit from the improvements, and prospective tenants will be more likely to locate to the area, filling vacant spaces. This is one way to jump-start a reversal of negative perceptions of the area.

2. Removal of Outdated and/or Obsolete Buildings, Reuse of Vacant Buildings, and Addition of Green Space:

Once a BID/BIZ has been established, we recommend the city acquire the outlot buildings in front of Logan Square, including the outdated mall space, Martinizing Dry Cleaners, and the vacant bank and restaurant properties. The vacated structures should be removed and the properties cleaned with assistance from the Brownfields Program. By opening up this important corner to MLK, there is a greater opportunity to attract an anchor tenant to Logan Square, as visibility at a major intersection is an important factors in retail site selection. Long-term plans should include acquiring and demolishing other eyesores in the BID that are vacant and obsolete, and that detract from the viability of the area.

Once empty, the northwest corner of MLK and Holmes presents an opportunity to connect with the surrounding communities on a physical and social level. We see this intersection as one of the main focal points in south Lansing, and believe that the creation of community and entertainment space (as shown in Figure 7 on page 44, top right and bottom examples) will help to establish a more positive image, strong brand for the community. This “third place,” with its strong ties to the neighboring residential and commercial areas, holds potential to host “Friday night music in the park” nights, classic car events, and similar events to what Old Town has with the Festivals of the Sun and Moon; and the Blues Festival. Residents might also enjoy utilizing this space for a Christmas tree during the winter holidays.

The area would also benefit from this space hosting a farmer's market, as it is in close proximity to a larger population base, easier to access by vehicle and public transportation, and closer to other businesses, which encourages cross shopping and increases visibility. Vendors will be able to take advantage of greater opportunities to sell their products; and south Lansing residents, some of whom do not have private transportation, will have greater access to fresh produce. The development of this community and entertainment space should be preceded by other elements of improvement, such as traffic improvements, curb appeal, and the location of a strong anchor tenant in Logan Square.

The success of Logan Square hinges upon the ability to secure a strong, quality anchor tenant, such as a Michaels, Hobby Lobby, Petco, or other national brand.[3] Securing a national brand will create the incentive for smaller businesses to locate in the remaining vacant spaces. However, it may be necessary to offer tax incentives and assistance from the On the Boulevard business association to locate or relocate businesses to the area.

3. *Create a Brand for the Area, with the BID/BIZ Taking the Lead:*

Leaders from the BID or BIZ should take the lead in creating a brand for the MLK and Holmes intersection to establish a positive identity for the area, such as the "Logan Village" or similar name. This may find the corner anchored by "Logan Village Park." By incorporating "Logan" into the brand image name, it will be more easily remembered and repeated by residents and customers, since Logan Square has been the focal point of MLK and Holmes for decades. This brand should be incorporated into signs, and in marketing for promotional events. Though a smaller effort, it will contribute to the rebuilding of south Lansing's image and create the needed distinction from the other areas in south Lansing.

4. *Create an Overlay Zone to Address Design Standards:*

The LEDC should work with the BID/BIZ and the On the Boulevard business association to establish specific architectural and design standards for future development efforts that are consistent with the existing businesses in the area. By putting these standards in place, the commercial district's brand will be strengthened, and the area will be in a position to attract the types of businesses that will benefit the entire community.

3. The supply-demand model did not indicate any gap in the sporting goods, hobby, book, and music stores NAICS category (452), however, due to limitations in the supply-demand model and the distinction between Ingham County's and south Lansing's retail sales transactions, we believe that there is opportunity in this category for the location of a tenant like a Michael's, Hobby Lobby, or Petco at this specific location.

Holmes and Pleasant Grove

Conditions. Specific conditions for this intersection are:

- Vacant and deteriorating building conditions
- Property does not reflect pride in ownership
- Good proximity to neighborhoods and decent access for pedestrians and other non-motorized traffic

Strategies. Strategies to improve upon these conditions include:

1. *Establishing a BIZ and Cleaning-up Deteriorating Properties:*

Providing the businesses in the area with the necessary tools to be proactive in the improvement of their district will help restore pride in ownership. This neighborhood commercial area has great proximity to the MLK and Holmes and has decent connectivity through sidewalks and bike lanes. However, infrastructure improvements should be made, including the clean-up and landscaping of corner parcels. Basic beautification efforts, including seasonal plantings and adding more trees, will also create a more appealing intersection.

2. *Creating an Overlay Zone for Design Standards:*

Rather than creating a separate overlay zone for the Holmes and Pleasant Grove intersection, it may be advantageous for the overlay zone established at MLK and Holmes to extend the boundaries to include this intersection. Future developments in the area would abide by the same provisions, discouraging the types of businesses that attract negative attention.

3. *Redevelopment of Retail Space:*

Long-term plans of this intersection should include the redevelopment of retail space on the northwest and southwest corners. The current structures on these corners, including Drake's Market, 1910 Meat Market, BW's Hair Fashions, and BBQ Shrimp and Carry-Out, and the outdated strip mall are in poor condition. The development of new and dense retail space on these corners would benefit the businesses by providing them with shared parking space and frontage on the corner. This corner also presents an opportunity for the development of mixed-use space, and the proximity to a school, and the residential feel of the area, would help attract buyers.

Waverly and Jolly

Conditions. Specific conditions for this intersection are:

- Spotty commercial development
- Neglected commercial structures and property

Strategies. Strategies to address these conditions include:

1. *Creating an Overlay Zone for Design Standards:*

An overlay zone for the Waverly and Jolly intersection should be established to provide architectural and design standards for future development in the area. Such standards will help to discourage the types of businesses that detract from the positive character of the area.

2. *Acquisition and Transformation of Abandoned Structures and Properties:*

Similar to recommendations at the Cedar, Pennsylvania, and Edgewood intersection, there is a creative opportunity to repurpose the vacant gas station on the northeast corner of the intersection and/or the vacant fast-food structure on the west side of Waverly Road. This neighborhood commercial area is isolated from the rest of south Lansing, and the residents would benefit from a wireless Internet cafe or coffee shop and WiFi hotspot. As with the Holmes and Mt. Hope intersection, this location also has a strong residential element which could be further strengthened by incorporating a mixed-use development in future years.

3. *Removal of Outdated and/or Obsolete Buildings*

The vacant buildings on the west side of Waverly Road, the former Rite Aid on the southeast corner and the strip mall behind it are outdated, obsolete, and detract from the area's charm and character. Long-term plans should include the removal and clean-up of these properties. The use of OPRA may be possible to utilize on some of these sites.

As an incentive for a developer to invest in this area, the city may be able to take advantage of the MEDC's Urban Land Assembly Program, or other such programs, in readying property for a developer to invest in the southeast corner parcel. Businesses from the strip mall east of the former Rite Aid could relocate here in the future.

4. *Improving Pedestrian Walkways:*

This intersection would benefit from improvements for pedestrians, as it is in close proximity to neighborhoods. The implementation of wide sidewalks and nicely maintained right-of-ways will improve safety in the area and encourage non-motorized traffic. There is currently not a sidewalk on Waverly, south of Jolly, except for a small portion in front of the former Rite Aid, and the sidewalks north of Jolly are not very far set back from the road.

Appendix A: Community Engagement

FOCUS GROUP METHODOLOGY

Twenty-three business representatives participated in the focus group following invitation by the LEDC, Anderson Economic Group, the SLBA, and the “On the Boulevard” business association. Participants came from areas throughout south Lansing and from various business industries.

The participants met the AEG team and learned about the project and its purpose. Attendees were given a brief presentation of demographic and socioeconomic trends in south Lansing, and business locations by major sector in the area. They were then asked to form small groups, react to the information presented, and answer questions pertaining to business investment in the area. Afterward, each group reported out their answers to the whole group. The questions are shown in the agenda below.

FOCUS GROUP AGENDA

The Community, Business, and Faculty and Staff focus group sessions were conducted using the below agenda.

1. Welcome
   - Introduction of Consultants
   - Project overview and purpose
   - Today's agenda
   - What we will do with today's information
2. Introduction of Participants
   - Name, business, and one reason your business is located in south Lansing
3. What we know
   - Brief presentation on area demographics, socioeconomics, and business locations
   - Quick Q&A
4. Visioning exercise (in breakout groups)
5. Breakout group reports
   - “Recorder” from each group presents group discussion items to larger group
6. Final step of visioning exercise
   - Show us the money! How would you invest in south Lansing tomorrow?

BUSINESS COMMUNITY FOCUS GROUP SUMMARY

During the visioning exercise business leaders from south Lansing were separated into breakout groups and given the four questions below to discuss and give feedback on:

- What surprised you about the data?

- What are three things about south Lansing you would not change?
- What are three things about south Lansing you would change to make it more attractive to business investment?
- When you tell someone where your business is located, how do you describe the location? How do most people respond? (i.e. what is their perception of the area?)

The answers to each questions as given by the business community breakout groups are provided below.

What surprised you about the data?

- The slower rate of decline in population in south Lansing as compared to the City of Lansing
- The low per capita income in the area
- Decline in population without decline in income
- Per capita income was greater in south Lansing than Lansing
- 60 percent of population in Lansing is in south Lansing
- How much lower income levels are versus national average
- Income levels didn’t decline at the same levels as population decline
- There was any population growth in Michigan
- Surprised that south Lansing’s income was projected to increase relative to economy and job loss

What are three things about south Lansing you would not change?

- Diversity of the community
- The zoo
- The schools
- The new farmer’s market
- Solid public services
- Big box stores in Edgewood
- Close to MSU
- Hospital
- Home improvement stores
- Restaurants
- Freeway accessibility
- The business to business community
- Cata
- Board of Water and Light
- Location, proximity to freeways
- Sense of community—small town feel
- Multi-cultural

- Many and diverse offerings—public and private schools, libraries, great park/zoo, retail, public services
- Real people—not snooty, approachable, friendly
- Great green space—zoo, parks, nature center
- Expressway access
- Meijer—big grocer as destination, Sam's, Target, Edgewood
- Emphasis on park land, Hawk Island
- Legacy businesses, tradition, variety, access to everything

What are three things about south Lansing you would change to make it more attractive to business investment?

- Invest in a children's healthcare center to compliment hospital
- Improve road condition and flooding problem
- Welcome at junctions and community entrances
- Lower property taxes
- Add bike lanes
- Add a traffic circle plan
- Bring in live entertainment and night venues
- Beautification of 96 junction/intersection
- Add to the police force
- Add security lights or cameras
- Customer friendly signs for businesses during construction
- Common marketing effort and identities
- Demolish abandoned buildings
- Add a turn lane to Pennsylvania Ave.
- Create incentives to fill recently constructed buildings
- Create healthcare corridor
- Fill vacant properties
- Central gathering place
- Rework Pennsylvania/Cedar intersection
- Road surfaces
- Crime rate (lower it), lighting, crime cameras, increase police visibility
- No more strip malls and abandoned buildings
- Lack of better dinning establishments
- Demolish or enforce zoning code to improve appearance so the bad apples don't spoil perception and investment
- Lack of aesthetic appeal
- No cohesive identity-no central gathering point
- Incentives to fill or tear down empty buildings (Builders Square)
- Disjointed planning of residential/business

When you tell someone where your business is located, how do you describe the location? How do most people respond? (i.e. what is their perception of the area?)

- On MLK 2 blocks north of 96
- MLK and Holmes
- South Pennsylvania, south of Mt. Hope, north of Cavanaugh
- Miller and Aurelius
- Washington green lawn
- 1 mile north of 96 next to Taco Bell
- Edgewood boulevard where Target and Sam's are
- On Tranter, dead-ends on Cavanaugh and Jolly, several blocks east of south Pennsylvania
- Go down Pennsylvania until you see Lexus dealership and go east
- Next to Rycus, with the largest sign in Lansing
- Next to Kitchen Shop
- Where Cedar and Pennsylvania meet
- south Lansing industrial park area
- Corner of Cedar and Holmes
- Exit 104, turn south, first building on left
- Next to Sam's
- Next to Everett High School

How do most people respond? (i.e. what is their perception of the area?)

- Surprised how close
- Knowing response
- Surprised by location
- OH!
- Rough area on Edgewood
- Reputation for high crime

In an exercise following the group breakout sessions, each participant was given five 50 dollar bills of funny money and was asked to 'invest' any desired amount into any or a combination of retail category(s) that were listed. Each of the ten categories participants chose from reflected an industry group from the retail or arts, entertainment, and recreation sectors.

Their investments are reflections of what participants thought would succeed in south Lansing, or the kind of business they themselves would choose to open in south Lansing, if they were to. The following are the ten categories participants chose from, followed by the total amount of money invested in that category, listed in order of popularity:

1. Mid- to high-end restaurant *like* Dusty's, Red Cedar Grill, Riverhouse Inn - $1,250

2. “Fresh” fast-food *like* Panera Bread, Grand Traverse Pie Company, Baja Fresh, Au Bon Pain, Noodles & Company - $1,100

3. Home improvements/furnishing stores *like* Home Depot, Home Goods - $900

4. Grocery or specialty food stores *like* Trader Joe’s, meat or other fresh deli, natural or organic market - $750

5. Entertainment venue *like* arcade, mini-golf, laser tag, band stand, etc. - $750

6. Mid-priced apparel/shoe stores *like* DSW, Old Navy, H&M, etc. - $450

7. Sporting goods, hobby, or book stores *like* Moosejaw, Gander Mountain, Schuler Books - $250

8. Electronics or appliances stores *like* Best Buy, ABC Warehouse - $250

9. Other - $150

10. Personal or home services *like* dry cleaners, tailors, tax preparation services, lawn care, salons/spas - $0

ONLINE SURVEY

An online survey was used to allow the larger community a chance to participate in this process.The survey was available from the home page of the Lansing Economic Development Corporation, and its availability was mentioned in the Lansing State Journal, in communications with the neighborhood and business associations in south Lansing, through follow-up to local businesses that participated in the focus group, and in social networks’ online applications and blogs, such as the Grand River Connection and Develop.MetroLansing.

The survey began with a filtering question to determine the category that best described the respondent. Based on how they answered the first question, they were then directed to specific sets or questions for 1) south Lansing business owners and operations, 2) south Lansing residents, and 3) other interested parties. The below is a summary of the results from each group of respondents.

Business Owners / Managers

Our survey included seven questions specifically targeted to business owners and operators in south Lansing. A total of 21 responses were received to this section of the survey. A summary of the responses for each question is below.

1. Of the respondents, 13 were from businesses located on Pennsylvania Avenue, four were from Cedar Street businesses, and there were two each from businesses on Waverly and MLK.

2. One-third of the respondents were from retail trade businesses, while the remainder were from a variety of other sectors, none of which had more than three respondents.

3. Sixteen of the 21 respondents were from businesses that have operated in south Lansing for more than ten years. Only one respondent was from a new business (open one year or less).

4. When asked about conditions in the area influencing the success of their business:
   - 62 percent said the condition of buildings and curb appeal in the area have no influence or have a negative influence on their business, while 33.3 percent said building conditions and curb appeal were having a positive influence. Further, 71.4 percent said blight and vacancies were having a negative influence on their businesses, while only 23.8 percent said the issue of blight and vacancies was not influencing their businesses success.
   - The cost of land, taxes, and fees are, on average, seen as a positive condition in the area, as no respondents reported land costs as having a negative influence on their business, and only 28.6 percent reported taxes and fees as having a negative influence. 62 percent of respondents said relative taxes and fees have either no influence of a positive influence on the success of their businesses.
   - The condition of road networks and connectivity is viewed as having a largely negative influence on the success of businesses in south Lansing. Only 3 businesses, all of which were located on Pennsylvania Avenue, said the road conditions and connectivity were a positive. Fourteen said the road networks and connectivity was a negative influence (including 9 on Pennsylvania), and 4 reported that the road networks and connectivity had little or no influence on their business's success.
   - Of other issues addressed in the survey, 15 of 21 said “perceptions of the area” and “safety issues and areas of loitering” were having negative impacts on the success of their business.

5. When asked if they agreed with the statement “Vandalism, shoplifting, and crime is a current problem for my business,” 14 of 21 respondents either strongly or somewhat agreed, and 7 somewhat or strongly disagreed.

6. When asked if they agreed with the statement “My business would benefit if area streets and transportation routes were changed to better accommodate pedestrians, bicyclists, and other non-motorized traffic, even if motorized traffic was made more difficult,” 7 strongly disagreed and 6 somewhat disagreed. Only 3 strongly agreed, while 5 somewhat agreed.

7. When asked about the use and availability of local business to business vendors, the majority of respondents indicated that they either obtain most goods and services from businesses in south Lansing, or know local providers are available but they choose a provider from outside of south Lansing.

   Categories of goods and services covered in the survey were janitorial, accounting, office supplies, office and computer equipment, legal services, computer repair, advertising and marketing, temporary staffing, packaging and shipping, and catering. None of these categories had more than 2 respondents indicate they felt the goods or services were not available locally. Only the legal services category had more respondents say they obtained those services from outside the area despite knowing the services were available within south Lansing.

South Lansing Residents

We also included 8 questions for residents of south Lansing. A total of 83 responses were received to this section of the survey. A summary of the responses for each question is below.

1. Of the 83 responding, 39 live closest to the Cedar/Pennsylvania/Edgewood intersection, 31 live closest to the MLK and Holmes intersection, 7 live near the Pleasant Grove and Holmes intersection, and the remaining 6 live closest to the Waverly and Jolly intersection.

2. When asked how often they visit the four main intersections being focused on for shopping or service needs, the most commonly visited intersection was Cedar/Edgewood/Pennsylvania (79 of 83 said they visit there at least a few times a month), with MLK and Holmes coming in a distant second (50 of 83 visit there at least a few times a month).
   - Of the 6 respondents living closest to Waverly and Jolly, one-half regularly visit that area for shopping or services needs.
   - Of the 7 living near Pleasant Grove and Holmes, 5 said they regularly visit that area for shopping or services needs.
   - Of the 31 living near Holmes and MLK, 25 said they regularly visit that area for shopping or services needs.
   - Of the 39 living near Cedar/Pennsylvania/Edgewood, all 39 said they regularly visit that area for shopping or services needs.

3. When asked about reasons for leaving south Lansing, we found that most leave on a regular basis (more than once a month) to dine at restaurants (89.2 percent), to shop casually (86.5 percent), and to go to work or school (79.5 percent). 66.3 percent said they leave regularly to buy necessities (food and personal care items), evidencing leakage from the market.

4. When asked about their level of satisfaction with specific retail categories in south Lansing, most respondents were:
   - Largely satisfied with grocery and produce offerings; fast-food and inexpensive restaurants; office supply stores; personal care and pharmaceutical stores; and hardware and home improvement stores.
   - Largely unsatisfied with the availability and quality of fine dining and upscale restaurants; apparel and shoe stores; sporting goods stores; book stores; furniture and home furnishing stores; and salons and spas.
   - Mildly satisfied or unsatisfied with the availability and quality of family and mid-priced restaurants; coffee/bakery/deli shops; entertainment venues; and electronics / appliance stores.

5. When asked specifically about the Waverly and Jolly intersection, and the importance of specific items for revitalizing the area, we found:
   - The reusing of vacant buildings, and clean-up and better maintenance of properties, are of the most importance

- Better shopping and restaurant choice and quality, improved pedestrian and bicyclist access, and improved traffic patterns and safety were also of some importance
- The addition of mixed-use developments was most often said to be something nice, but not necessary, or not important.

6. When asked specifically about the Pleasant Grove and Holmes intersection, and the importance of specific items for revitalizing the area, we found:
   - The reusing of vacant buildings, and clean-up and better maintenance of properties, are of the most importance
   - Better shopping and restaurant choice and quality, improved pedestrian and bicyclist access, and improved traffic patterns and safety were also of some importance
   - The addition of mixed-use developments was most often said to be something nice, but not necessary. However, 31.2 percent of respondents did say it would be very or somewhat important, and 30.1 percent said it was not important.

7. When asked specifically about the Holmes and MLK intersection, and the importance of specific items for revitalizing the area, we found:
   - The reusing of vacant buildings, and clean-up and better maintenance of properties, are of the most importance
   - Better shopping and restaurant choice and quality were also of importance, and to a higher degree than at the Pleasant Grove/Holmes and the Waverly/Jolly intersections.
   - Improved pedestrian and bicyclist access, and improved traffic patterns and safety were also of some importance
   - The addition of mixed-use developments was most often said to be something nice, but not necessary. However, 41.0 percent of respondents did say it would be very or somewhat important, and 27.7 percent said it was not important.

8. When asked specifically about the Cedar/Pennsylvania/Edgewood intersection, and the importance of specific items for revitalizing the area, we found:
   - The reusing of vacant buildings, and clean-up and better maintenance of properties, are of the most importance
   - Better shopping and restaurant choice and quality were also of importance, and to a higher degree than at the Pleasant Grove/Holmes and the Waverly/Jolly intersections.
   - The improvement of traffic patterns and safety, and making the area more accessible for pedestrians and bicyclists were also cited as being important, and to a greater degree than at other intersections.
   - The addition of mixed-use developments was most often said to be something nice, but not necessary, or not important.

Other Interested Parties

We also included 7 questions for those interested in the economic development of south Lansing, but who do not live in the area and also do not own or operate a business there. A total of 46 responses were received to this section of the survey. A summary of the responses for each question is below.

1. The majority of respondents (28 of 46) were between 31 and 60 years of age. Fourteen were 30 years old or younger, and 4 were over 60 years old.

2. Eight of the respondents lived in the 48912 zip code (east side of Lansing); 7 lived in the 48842 (Holt) zip code, and 6 lived in the 48906 (north Lansing) zip code. Other respondents lived in the capitol area of Lansing, East Lansing, Okemos, Dewitt, Webberville, Dimondale, Bath, Bancroft, and even one from Whitehall (north of Muskegon).

3. When asked about why and how often they visited south Lansing:
   - Seven of 46 said they go five or more times per week for work or school, and another six said they went at least once per week for work or school.
   - Thirty-two of 46 said they go to south Lansing regularly (a few times a month or more) to visit friends and family.
   - Twenty-two said they rarely go for grocery and produce stores, where as 24 said they go for grocery or produce stores at least a few times a month.
   - One-half said they rarely visit the area for fast-food and inexpensive restaurants, and 14 said they visit the area at least weekly for fast-food and inexpensive restaurants.
   - 26 reported rarely visiting the area for mid-priced and family restaurants, while 20 said they regularly visit the area for mid-priced and family restaurants.
   - Only 6 respondents said they regularly visit the area for fine dining and upscale restaurants.
   - Only two respondents visit the area on a weekly basis for coffee/bakery/deli shops. 36 rarely visit the area for such shops.
   - 14 respondents said they regularly visit the area for entertainment venues, while 32 said they rarely visit the area for entertainment venues.
   - Only 9 respondents regularly visit south Lansing for apparel and shoe stores; only 4 regularly visit for sporting goods stores; 3 of 46 regularly visit for book stores; 7 of 46 visit regularly for office supplies stores; and 6 of 46 regularly visit for furniture and home furnishing stores.
   - Ten of the 46 respondents said they regularly visit the area for electronics and appliance stores, and 17 said they regularly visit for hardware and home improvement stores.
   - 14 of the 46 regularly visit the area for personal care and pharmaceutical stores
   - Just two of the 46 respondents regularly visit south Lansing for salons and spas.

4. When asked specifically about the Waverly and Jolly intersection respondents said the reuse of vacant buildings and the clean-up and maintenance of existing properties were the most often items cited as important elements for revitalizing the area. The third most frequently cited item as being very or somewhat important was improving pedestrian and bicycle pathways and access.

   Improved shopping and restaurant choice and quality, as well as improved traffic patterns and safety, were also mentioned as being important by the majority of respondents. Only "mixed-use" developments were more often said to be not as important.

5. When asked specifically about the Pleasant Grove and Holmes intersection we found many respondents were not very familiar with the area, as evidenced by the 10 to 12 "not sure" responses given when asked about revitalization options.

   Of those who did know of the area, the most often cited revitalization items of importance were the reuse of vacant buildings and the clean-up and better maintenance of properties.

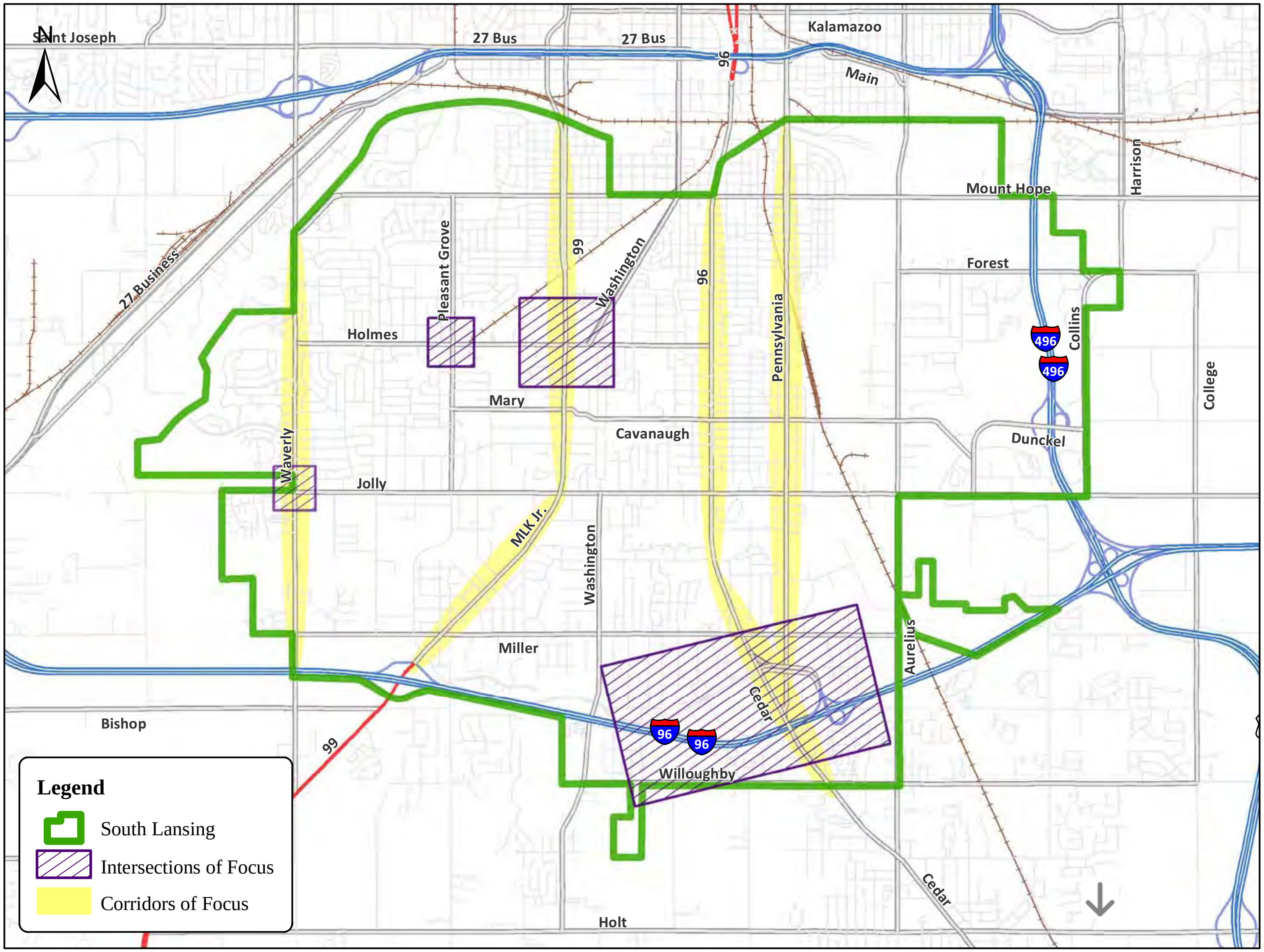
6. The clean-up and better maintenance of properties at the Holmes and MLK intersection was also the most frequently cited important item for revitalizing the area, followed by improving shopping and restaurant choice and quality, and making the area more accessible to pedestrians and bicyclists.

7. For the Cedar/Edgewood/Pennsylvania intersection, the reuse of vacant buildings and the clean-up and maintenance of existing properties were most often cited as important elements for revitalizing the area. Improving traffic patterns, as well as improving restaurant and shopping quality and choice were also very often cited as very important, as was improving access for pedestrian and bicycle traffic.

Appendix B: Demographics

LIST OF EXHIBITS

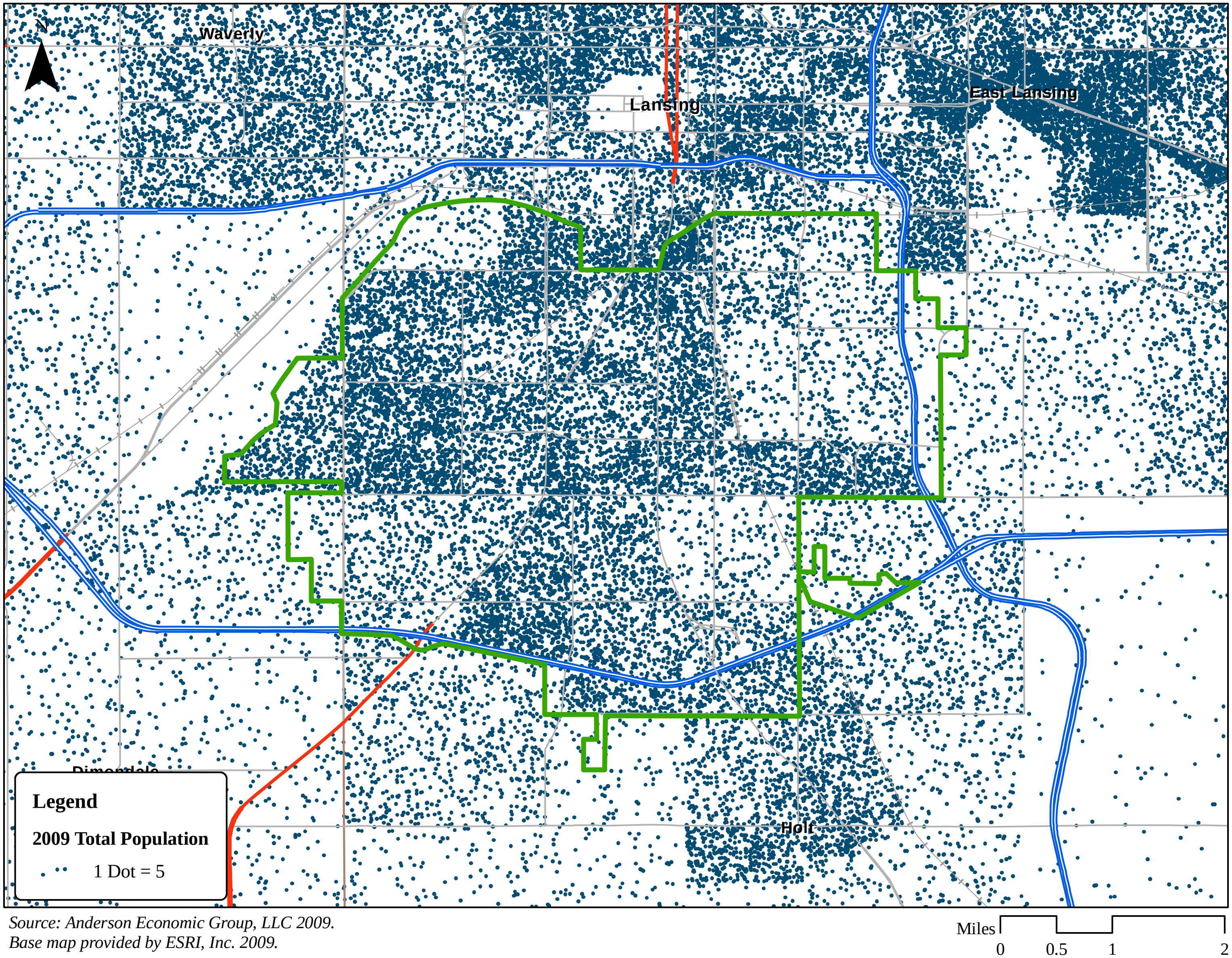
Exhibit 1. Overview of South Lansing and Corridors/Intersections of Focus



Source: Anderson Economic Group, LLC 2009.
Base map provided by ESRI, Inc. 2009.

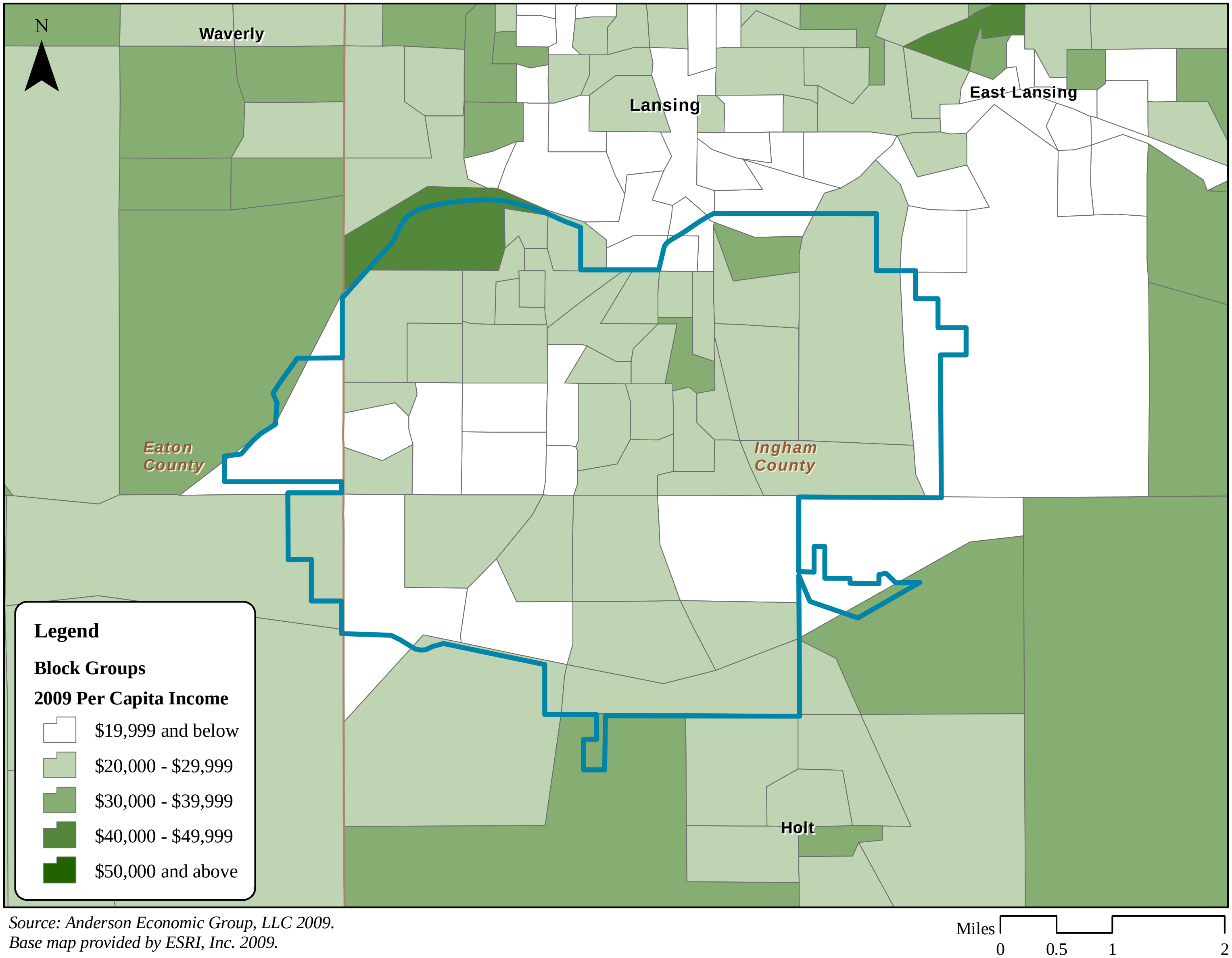
Miles 0 0.5 1 2

Exhibit 2. **Population Density of South Lansing - 2009**



Source: Anderson Economic Group, LLC 2009.
Base map provided by ESRI, Inc. 2009.

Exhibit 3. Per Capita Income by Block Group in South Lansing - 2009



Source: Anderson Economic Group, LLC 2009.
Base map provided by ESRI, Inc. 2009.

	South Lansing	City of Lansing	Ingham County	State of Michigan
POPULATION				
1990 Population (census)	71,702	126,975	281,912	9,295,297
2000 Population (census)	68,854	119,127	279,320	9,938,444
2009 Population	67,108	114,894	279,733	10,194,648
2014 Population	66,079	112,800	277,916	10,227,800
CAGR 1990-2000	-0.4%	-0.6%	-0.1%	0.7%
CAGR 2000-2009	-0.3%	-0.4%	0.0%	0.3%
CAGR 2009-2014	-0.3%	-0.4%	-0.1%	0.1%
2000 Pop in Group Quarters	599	893	16,827	249,889
2009 Group Quarters Population	611	910	17,190	259,088
2009 Group Quarters Population	0.9%	0.8%	6.2%	2.6%
PER CAPITA INCOME				
1989 Per Capita Income (census)	$13,310	$12,268	$13,740	$14,154
1999 Per Capita Income (census)	$18,654	$17,923	$21,079	$22,168
2009 Per Capita Income	$22,840	$21,818	$25,205	$26,713
2014 Per Capita Income	$23,314	$22,333	$25,727	$27,475
CAGR 1989-1999	3.4%	3.9%	4.4%	4.6%
CAGR 1999-2009	2.0%	2.0%	1.8%	1.9%
CAGR 2009-2014	0.4%	0.5%	0.4%	0.6%
HOUSEHOLDS				
1990 Avg. Household Size	2.5	2.5	2.6	2.7
2000 Avg. Household Size	2.4	2.4	2.4	2.6
2009 Avg. Household Size	2.3	2.3	2.4	2.5
1990 Total Households	28,664	50,405	102,648	3,419,331
2000 Total Households	29,001	49,505	108,593	3,785,661
2009 Total Households	28,926	48,796	110,796	3,939,172
2014 Total Households	28,725	48,291	110,793	3,972,480
CAGR 1990-2000	0.1%	-0.2%	0.6%	1.0%
CAGR 2000-2009	0.0%	-0.2%	0.2%	0.4%
CAGR 2009-2014	-0.1%	-0.2%	0.0%	0.2%
HOUSEHOLD INCOME TOTALS				
1999 Median HH Income	$37,276	$35,094	$40,807	$44,683
2009 Median HH Income	$47,935	$45,068	$50,763	$55,536
2014 Median HH Income	$51,323	$49,742	$53,013	$56,866
CAGR 1999-2009	2.5%	2.5%	2.2%	2.2%
CAGR 2009-2014	1.4%	2.0%	0.9%	0.5%
1989 Avg. HH Income	$33,229	$30,617	$36,781	$38,064
1999 Avg. HH Income	$43,977	$42,770	$53,170	$57,400
2009 Avg. HH Income	$53,039	$51,228	$61,499	$68,229
2014 Avg. HH Income	$53,650	$51,995	$62,118	$69,722
CAGR 1989-1999	2.8%	3.4%	3.8%	4.2%
CAGR 1999-2009	1.9%	1.8%	1.5%	1.7%
CAGR 2009-2014	0.2%	0.3%	0.2%	0.4%

	South Lansing	City of Lansing	Ingham County	State of Michigan
HOUSEHOLD INCOME CATEGORIES				
2009 HHs w/Inc $14,999 and Below	3,468	7,258	14,786	417,365
2009 HHs w/Inc $15,000 - $29,999	4,688	8,318	16,798	574,172
2009 HHs w/Inc $30,000 - $44,999	5,374	8,784	17,325	583,973
2009 HHs w/Inc $45,000 - $59,999	5,010	8,022	16,744	544,269
2009 HHs w/Inc $60,000 - $74,999	4,904	7,813	16,418	591,110
2009 HHs w/Inc $75,000 - $99,999	3,183	4,847	13,818	551,074
2009 HHs w/Inc $100,000 - $124,999	1,430	2,245	6,778	291,883
2009 HHs w/Inc $125,000 - $149,999	373	652	3,059	154,045
2009 HHs w/Inc $150,000 - $199,999	310	493	2,627	119,182
2009 HHs w/Inc $200,000 and Above	186	362	2,442	112,060
2009 HHs w/Inc $14,999 and Below	12.0%	14.9%	13.3%	10.6%
2009 HHs w/Inc $15,000 - $29,999	16.2%	17.0%	15.2%	14.6%
2009 HHs w/Inc $30,000 - $44,999	18.6%	18.0%	15.6%	14.8%
2009 HHs w/Inc $45,000 - $59,999	17.3%	16.4%	15.1%	13.8%
2009 HHs w/Inc $60,000 - $74,999	17.0%	16.0%	14.8%	15.0%
2009 HHs w/Inc $75,000 - $99,999	11.0%	9.9%	12.5%	14.0%
2009 HHs w/Inc $100,000 - $124,999	4.9%	4.6%	6.1%	7.4%
2009 HHs w/Inc $125,000 - $149,999	1.3%	1.3%	2.8%	3.9%
2009 HHs w/Inc $150,000 - $199,999	1.1%	1.0%	2.4%	3.0%
2009 HHs w/Inc $200,000 and Above	0.6%	0.7%	2.2%	2.8%
2009 Share of HHs Earning <$30K	28.2%	31.9%	28.5%	25.2%
2009 Share of HHs Earning $30K+	71.8%	68.1%	71.5%	74.8%
2009 Share of HHs Earning $60K+	35.9%	33.6%	40.7%	46.2%
2009 Share of HHs Earning $100K+	7.9%	7.7%	13.5%	17.2%

	South Lansing	City of Lansing	Ingham County	State of Michigan
ETHNICITY AND RACE (%)				
1990 Pop by Race Base	100.0%	100.0%	100.0%	100.0%
1990 White / Caucasian	76.8%	72.4%	82.5%	82.2%
1990 Black / African American	16.1%	18.1%	9.8%	13.7%
1990 American Indian / Aleut	0.7%	1.0%	0.7%	0.6%
1990 Asian	1.1%	1.7%	2.6%	1.1%
1990 Pacific	0.0%	0.0%	0.0%	0.0%
1990 Other Race	3.2%	4.7%	2.6%	0.9%
1990 Two or More Races	1.9%	2.0%	1.8%	1.5%
2000 Pop by Race Base	100.0%	100.0%	100.0%	100.0%
2000 White / Caucasian	67.5%	65.6%	79.5%	80.2%
2000 Black / African American	21.7%	21.6%	10.9%	14.2%
2000 American Indian / Aleut	0.6%	0.8%	0.5%	0.6%
2000 Asian	2.7%	2.8%	3.7%	1.8%
2000 Pacific	0.1%	0.0%	0.1%	0.0%
2000 Other Race	3.5%	4.5%	2.4%	1.3%
2000 Two or More Races	4.0%	4.6%	3.0%	1.9%
2000 Hispanic - of any race	7.8%	9.9%	5.8%	3.3%
2009 Pop by Race Base	100.0%	100.0%	100.0%	100.0%
2009 White / Caucasian	62.2%	60.3%	75.5%	78.3%
2009 Black / African American	23.8%	23.6%	11.9%	14.5%
2009 American Indian / Aleut	0.6%	0.8%	0.6%	0.6%
2009 Asian	4.1%	4.3%	5.5%	2.7%
2009 Pacific	0.1%	0.1%	0.1%	0.0%
2009 Other Race	4.4%	5.7%	3.0%	1.6%
2009 Two or More Races	4.7%	5.3%	3.5%	2.2%
2009 Hispanic - of any race	9.9%	12.5%	7.3%	4.1%

	South Lansing	City of Lansing	Ingham County	State of Michigan
AGE				
2009 Total Population 0-4	5,328	9,180	17,138	678,627
2009 Total Population 5-9	4,866	8,426	16,505	684,878
2009 Total Population 10-14	4,540	7,810	16,552	691,566
2009 Total Population 15-19	4,525	7,890	25,615	736,749
2009 Total Population 20-24	5,821	9,997	36,064	676,600
2009 Total Population 25-29	5,595	9,769	20,921	655,997
2009 Total Population 30-34	4,784	8,387	17,584	621,774
2009 Total Population 35-39	4,853	8,251	17,112	681,612
2009 Total Population 40-44	4,613	7,833	17,548	722,448
2009 Total Population 45-49	4,476	7,755	18,864	785,798
2009 Total Population 50-54	4,276	7,363	18,515	752,644
2009 Total Population 55-59	3,786	6,368	16,602	667,673
2009 Total Population 60-64	2,967	4,934	12,731	533,524
2009 Total Population 65-69	1,996	3,306	8,539	386,878
2009 Total Population 70-74	1,451	2,409	6,029	289,425
2009 Total Population 75-79	1,265	2,053	5,036	239,810
2009 Total Population 80-84	1,024	1,659	4,128	197,078
2009 Total Population 85+	942	1,504	4,250	191,567
2009 Total Population 18+	49,772	84,952	219,526	7,709,030
2009 Total Population 21+	46,771	79,646	194,660	7,250,659
2014 Total Population 0-4	5,183	8,914	16,805	670,108
2014 Total Population 5-9	4,748	8,236	16,275	682,327
2014 Total Population 10-14	4,478	7,735	16,363	694,481
2014 Total Population 15-19	4,272	7,313	24,106	687,208
2014 Total Population 20-24	5,945	10,157	36,073	690,107
2014 Total Population 25-29	5,553	9,487	20,303	633,966
2014 Total Population 30-34	4,704	8,139	18,042	663,767
2014 Total Population 35-39	4,201	7,410	16,546	641,749
2014 Total Population 40-44	4,419	7,469	16,607	675,633
2014 Total Population 45-49	4,106	6,954	16,520	687,104
2014 Total Population 50-54	3,962	6,860	17,288	733,207
2014 Total Population 55-59	3,746	6,420	16,585	708,256
2014 Total Population 60-64	3,367	5,597	14,455	606,679
2014 Total Population 65-69	2,629	4,369	11,271	486,489
2014 Total Population 70-74	1,759	2,882	7,607	348,099
2014 Total Population 75-79	1,177	1,930	5,030	243,233
2014 Total Population 80-84	899	1,454	3,772	178,598
2014 Total Population 85+	930	1,475	4,268	196,789
2014 Total Population 18+	49,218	83,739	219,269	7,781,509
2014 Total Population 21+	46,291	78,633	195,128	7,340,449

	South Lansing	City of Lansing	Ingham County	State of Michigan
ADULT EDUCATIONAL ATTAINMENT				
2000 Coll <1 Yr	4,728	7,281	14,213	534,119
2000 Coll 1+ Yrs	7,572	12,490	25,077	962,457
2000 Assoc Deg	3,701	5,783	12,470	448,112
2000 Bach Deg	5,795	10,083	30,151	878,680
2000 Mast Deg	1,903	3,638	14,202	363,931
2000 Prof Deg	613	1,052	4,475	103,840
2000 Doct Deg	432	778	4,862	49,808
2000 Thru 8th Grade or Lower	1,297	2,654	4,236	244,257
2000 Attended College	24,744	41,105	105,450	3,340,947
2000 4-Yr. Degree or More	8,743	15,551	53,690	1,396,259
2000 Thru 8th Grade or Lower	3.0%	3.6%	2.6%	3.8%
2000 Attended College	57.2%	55.8%	64.7%	52.1%
2000 4-Yr. Degree or More	20.2%	21.1%	33.0%	21.8%
2009 Pop 25+ by Educ Base	42,029	71,590	167,859	6,726,228
2009 Less than 9th Grade	1,263	2,681	4,203	244,186
2009 Some High School	3,610	7,222	10,959	623,549
2009 High School Grad	11,985	19,648	39,126	2,159,103
2009 Some College	11,606	18,702	38,276	1,522,139
2009 Associates Degree	4,010	6,264	14,045	528,010
2009 Bachelor Degree	6,231	10,859	33,701	1,021,694
2009 Graduate Degree	3,324	6,213	27,549	627,547
2009 Less than High School	4,873	9,903	15,162	867,735
2009 Attended College	25,171	42,038	113,571	3,699,390
2009 4-Yr. Degree or More	9,555	17,072	61,250	1,649,241
2009 Less than High School	11.6%	13.8%	9.0%	12.9%
2009 Attended College	59.9%	58.7%	67.7%	55.0%
2009 4-Yr. Degree or More	22.7%	23.8%	36.5%	24.5%
TRAVEL TIME TO WORK				
2000 Travel Time <15 min	12,644	22,516	53,243	1,347,958
2000 Travel Time 15-29 min	15,082	23,688	57,202	1,675,839
2000 Travel Time 30-44 min	2,864	4,451	13,688	820,958
2000 Travel Time 45-59 min	912	1,606	4,033	304,785
2000 Travel Time 60+ min	1,698	2,793	6,934	263,067
2000 Travel Time <15 min	37.3%	39.9%	38.2%	29.7%
2000 Travel Time 15-29 min	44.5%	41.9%	41.1%	36.9%
2000 Travel Time 30-44 min	8.5%	7.9%	9.8%	18.1%
2000 Travel Time 45-59 min	2.7%	2.8%	2.9%	6.7%
2000 Travel Time 60+ min	5.0%	4.9%	5.0%	5.8%

	South Lansing	City of Lansing	Ingham County	State of Michigan
HOUSING UNIT GROWTH AND TENURE				
1990 Total Housing Units	30,068	53,700	108,542	3,847,926
2000 Total Housing Units	30,677	53,158	115,056	4,234,279
2009 Total Housing Units	31,575	54,493	120,907	4,587,528
2014 Total Housing Units	31,617	54,582	121,708	4,664,540
CAGR 1990-2000	0.2%	-0.1%	0.6%	1.0%
CAGR 2000-2009	0.3%	0.3%	0.6%	0.9%
CAGR 2009-2014	0.0%	0.0%	0.1%	0.3%
1990 Owner Occupied HUs	17,000	27,930	59,942	2,427,643
2000 Owner Occupied HUs	17,456	28,648	65,986	2,793,124
2009 Owner Occupied HUs	17,072	27,811	67,111	2,900,790
2014 Owner Occupied HUs	16,638	27,000	66,431	2,922,291
1990 Percent Owner Occ.	56.5%	52.0%	55.2%	63.1%
2000 Percent Owner Occ.	56.9%	53.9%	57.4%	66.0%
2009 Percent Owner Occ.	54.1%	51.0%	55.5%	63.2%
2014 Percent Owner Occ.	52.6%	49.5%	54.6%	62.6%
1990 Renter Occupied HUs	11,664	22,476	42,706	991,688
2000 Renter Occupied HUs	11,545	20,856	42,607	992,537
2009 Renter Occupied HUs	11,854	20,985	43,685	1,038,382
2014 Renter Occupied HUs	12,087	21,291	44,362	1,050,189
1990 Percent Renter Occ.	38.8%	41.9%	39.3%	25.8%
2000 Percent Renter Occ.	37.6%	39.2%	37.0%	23.4%
2009 Percent Renter Occ.	37.5%	38.5%	36.1%	22.6%
2014 Percent Renter Occ.	38.2%	39.0%	36.4%	22.5%
1990 Vacant Hus	1,383	3,275	5,894	428,595
2000 Vacant HUs	1,638	3,618	6,463	448,618
2009 Vacant HUs	2,600	5,649	10,111	648,356
2014 Vacant HUs	2,844	6,244	10,915	692,060
1990 Vacancy Rate	4.6%	6.1%	5.4%	11.1%
2000 Vacancy Rate	5.3%	6.8%	5.6%	10.6%
2009 Vacancy Rate	8.2%	10.4%	8.4%	14.1%
2014 Vacancy Rate	9.0%	11.4%	9.0%	14.8%
2000 Avg. HH Size: Renter Occ	2.2	2.3	2.2	2.2
2000 Avg. HH Size: Owner Occ	2.5	2.5	2.6	2.7

	South Lansing	City of Lansing	Ingham County	State of Michigan
OWNER OCCUPIED HOME VALUES				
2000 Median Home Value	$76,076	$73,181	$97,674	$110,257
2009 Median Home Value	$84,378	$81,287	$107,824	$115,137
2014 Median Home Value	$85,939	$82,513	$109,812	$118,593
CAGR 2000-2009	1.2%	1.2%	1.1%	0.5%
CAGR 2009-2014	0.4%	0.3%	0.4%	0.6%
2000 Average Home Value	$81,529	$78,724	$119,341	$137,227
2009 Average Home Value	$89,518	$86,351	$131,887	$143,379
2014 Average Home Value	$91,165	$87,891	$133,412	$146,945
CAGR 2000-2009	1.0%	1.0%	1.1%	0.5%
CAGR 2009-2014	0.4%	0.4%	0.2%	0.5%
2009 OOHUs/Value $49,999 and Below	2,028	4,532	7,417	382,729
2009 OOHUs/Value $50,000 - $99,999	10,563	16,208	22,902	834,643
2009 OOHUs/Value $100,000 - $149,999	3,665	5,641	18,303	731,850
2009 OOHUs/Value $150,000 - $199,999	515	954	8,462	421,790
2009 OOHUs/Value $200,000 - $249,999	130	226	4,437	210,962
2009 OOHUs/Value $250,000 - $299,999	65	108	2,511	128,997
2009 OOHUs/Value $300,000 - $399,999	44	63	1,776	97,813
2009 OOHUs/Value $400,000 - $499,999	11	12	589	43,261
2009 OOHUs/Value $500,000 - $749,999	24	31	472	28,069
2009 OOHUs/Value $750,000 and Above	27	34	227	20,477
2009 OOHUs/Value $49,999 and Below	11.9%	16.3%	11.1%	13.2%
2009 OOHUs/Value $50,000 - $99,999	61.9%	58.3%	34.1%	28.8%
2009 OOHUs/Value $100,000 - $149,999	21.5%	20.3%	27.3%	25.2%
2009 OOHUs/Value $150,000 - $199,999	3.0%	3.4%	12.6%	14.5%
2009 OOHUs/Value $200,000 - $249,999	0.8%	0.8%	6.6%	7.3%
2009 OOHUs/Value $250,000 - $299,999	0.4%	0.4%	3.7%	4.4%
2009 OOHUs/Value $300,000 - $399,999	0.3%	0.2%	2.6%	3.4%
2009 OOHUs/Value $400,000 - $499,999	0.1%	0.0%	0.9%	1.5%
2009 OOHUs/Value $500,000 - $749,999	0.1%	0.1%	0.7%	1.0%
2009 OOHUs/Value $750,000 and Above	0.2%	0.1%	0.3%	0.7%

	South Lansing	City of Lansing	Ingham County	State of Michigan
AVERAGE CONTRACT RENT				
2000 Median Contract Rent	$475	$457	$489	$468
2000 Average Contract Rent	$467	$448	$523	$494
2000 Contract Rent: $199 and Below	856	1,555	2,386	73,410
2000 Contract Rent: $200 - $299	532	1,280	2,293	80,178
2000 Contract Rent: $300 - $399	1,947	4,210	6,092	175,177
2000 Contract Rent: $400 - $499	3,234	5,884	11,330	199,109
2000 Contract Rent: $500 - $599	2,620	4,244	8,285	162,711
2000 Contract Rent: $600 - $699	1,271	1,960	4,864	108,784
2000 Contract Rent: $700 - $799	578	822	2,981	52,574
2000 Contract Rent: $800 - $999	118	227	1,532	47,851
2000 Contract Rent: $1000 - $1249	73	91	826	16,823
2000 Contract Rent: $1250 - $1499	20	22	368	6,503
2000 Contract Rent: $1500 - $1999	0	0	306	6,709
2000 Contract Rent: $2000 and Above	0	10	234	3,718
2000 Contract Rent: Base	100%	100%	100%	100%
2000 Contract Rent: $199 and Below	8%	8%	6%	8%
2000 Contract Rent: $200 - $299	5%	6%	6%	9%
2000 Contract Rent: $300 - $399	17%	21%	15%	19%
2000 Contract Rent: $400 - $499	29%	29%	27%	21%
2000 Contract Rent: $500 - $599	23%	21%	20%	17%
2000 Contract Rent: $600 - $699	11%	10%	12%	12%
2000 Contract Rent: $700 - $799	5%	4%	7%	6%
2000 Contract Rent: $800 - $999	1%	1%	4%	5%
2000 Contract Rent: $1000 - $1249	1%	0%	2%	2%
2000 Contract Rent: $1250 - $1499	0%	0%	1%	1%
2000 Contract Rent: $1500 - $1999	0%	0%	1%	1%
2000 Contract Rent: $2000 and Above	0%	0%	1%	0%

Exhibit 5. **Employment by Industry - 2009**

Description	South Lansing Number	South Lansing Share	Lansing Number	Lansing Share	Ingham County Number	Ingham County Share	Michigan Number	Michigan Share
Health Care & Social Assistance	4,507	15.5%	7,128	14.8%	16,513	13.3%	608,541	14.7%
Educational Services	3,532	12.2%	5,823	12.1%	22,932	18.4%	425,626	10.3%
Public Administration	3,419	11.8%	5,220	10.8%	12,437	10.0%	181,808	4.4%
Retail Trade	3,075	10.6%	5,372	11.2%	12,610	10.1%	486,265	11.7%
Manufacturing	2,352	8.1%	3,706	7.7%	8,515	6.8%	654,764	15.8%
Accommodation & Food Services	2,171	7.5%	4,093	8.5%	9,573	7.7%	267,263	6.5%
Finance & Insurance	1,708	5.9%	2,478	5.1%	6,337	5.1%	174,100	4.2%
Other Services	1,487	5.1%	2,770	5.8%	6,266	5.0%	208,531	5.0%
Construction	1,286	4.4%	2,193	4.6%	4,909	3.9%	213,472	5.2%
Professional, Scientific, & Tech. Services	1,223	4.2%	2,007	4.2%	6,322	5.1%	224,816	5.4%
Admin., Support, & Waste Services	1,002	3.5%	1,849	3.8%	3,572	2.9%	131,383	3.2%
Transportation & Warehousing	861	3.0%	1,457	3.0%	2,864	2.3%	137,017	3.3%
Wholesale Trade	750	2.6%	1,243	2.6%	2,864	2.3%	122,627	3.0%
Information	664	2.3%	1,012	2.1%	2,759	2.2%	75,788	1.8%
Real Estate, Rental, & Leasing	467	1.6%	834	1.7%	2,235	1.8%	74,978	1.8%
Arts, Entertainment, & Recreation	277	1.0%	507	1.1%	1,829	1.5%	62,200	1.5%
Utilities	182	0.6%	300	0.6%	764	0.6%	33,017	0.8%
Agriculture, Forestry & Fishing	71	0.2%	169	0.4%	935	0.8%	46,988	1.1%
Mining	0	0.0%	0	0.0%	77	0.1%	8,879	0.2%
Mgmt. of Companies & Enterprises	0	0.0%	7	0.0%	72	0.1%	4,835	0.1%
TOTAL	29,034	100.0%	48,168	100.0%	124,385	100.0%	4,142,898	100.0%

Source: Anderson Economic Group, LLC 2009.
Base data provided by ESRI, Inc. 2009.

Exhibit 6. **Employment by Occupation - 2009**

Description	South Lansing		City of Lansing		Ingham County		State of Michigan	
	Number	Share	Number	Share	Number	Share	Number	Share
Office & Administrative Support	4,809	16.6%	7,555	15.7%	17,675	14.2%	535,009	12.9%
Sales & Related	3,167	10.9%	5,383	11.2%	13,243	10.6%	473,223	11.4%
Transportation & Material Moving	1,872	6.4%	3,237	6.7%	6,552	5.3%	257,472	6.2%
Management	1,820	6.3%	2,927	6.1%	10,196	8.2%	350,789	8.5%
Food Preparation and Serving	1,790	6.2%	3,481	7.2%	8,568	6.9%	235,561	5.7%
Production	1,728	6.0%	2,878	6.0%	5,576	4.5%	342,940	8.3%
Education, Training, & Library	1,726	5.9%	3,005	6.2%	12,446	10.0%	266,456	6.4%
Construction & Extraction	1,287	4.4%	2,138	4.4%	4,263	3.4%	181,739	4.4%
Health Care Support	1,271	4.4%	1,992	4.1%	6,738	5.4%	251,310	6.1%
Personal Care & Services	1,209	4.2%	2,012	4.2%	4,767	3.8%	147,013	3.5%
Business & Financial Operations	1,206	4.2%	1,833	3.8%	5,236	4.2%	168,067	4.1%
Health Care Practitioners & Tech. Occs.	1,178	4.1%	1,704	3.5%	3,233	2.6%	119,608	2.9%
Bldg. & Grounds Cleaning & Maintenance	1,122	3.9%	2,121	4.4%	3,702	3.0%	136,986	3.3%
Protective Services	968	3.3%	1,391	2.9%	3,191	2.6%	89,121	2.2%
Installation, Maintenance, & Repair	887	3.1%	1,407	2.9%	3,420	2.7%	164,885	4.0%
Computer & Math.	879	3.0%	1,384	2.9%	3,626	2.9%	80,868	2.0%
Community & Social Services	713	2.5%	1,262	2.6%	2,951	2.4%	74,944	1.8%
Arts, Design, Entertainment, Sports, & Media	455	1.6%	768	1.6%	2,471	2.0%	68,409	1.7%
Architecture & Engineering	401	1.4%	589	1.2%	2,023	1.6%	113,932	2.8%
Life, Physical, & Social Science	298	1.0%	569	1.2%	2,408	1.9%	32,408	0.8%
Legal	236	0.8%	477	1.0%	1,838	1.5%	38,475	0.9%
Farming, Fishing, & Forestry	12	0.0%	56	0.1%	262	0.2%	13,683	0.3%
TOTAL	29,034	100.0%	48,169	100.0%	124,385	100.0%	4,142,898	100.0%

Source: Anderson Economic Group, LLC 2009.
Base data provided by ESRI, Inc. 2009.

Exhibit 7. Dominant Lifestyle Cluster Descriptions

32 Rustbelt Traditions

Segment Code................. 32
Segment Name................ *Rustbelt Traditions*
LifeMode Group .... L10 *Traditional Living*
Urbanization Group......... U5 *Urban Outskirts I*

Demographic

Rustbelt Traditions neighborhoods are primarily a mix of married-couple families, single-parent families, and singles who live alone, similar to the U.S. household type distribution. This segment has the sixth largest population of all the Community Tapestry segments, with 8.4 million people. The median age is 36.1 years, just below the U.S. median. Most of the residents are white.

Socioeconomic

The median household income is $49,579, slightly below that of the U.S. median. Half of the employed residents work in white-collar jobs. For years, these residents sustained the manufacturing industry that drove local economies. Now, the service industry predominates, followed by manufacturing and retail trade. The median net worth for this segment is $90,754. Overall, 80 percent of residents aged 25 years and older have graduated from high school, 12 percent hold a bachelor's or graduate degree, and 29 percent have attended college.

Residential

Rustbelt Traditions neighborhoods are the backbone of older industrial cities in states that border the Great Lakes. Most residents live in modest, single-family homes. Homeownership is at 76 percent. The median home value of $107,222 is approximately three-fifths of the U.S. median. The relatively lower median home value is partially due to the age of the homes in these communities; nearly two-thirds of the housing units were built prior to 1960.

Preferences

Residents of *Rustbelt Traditions* are aptly named: They have lived, worked, spent, and played in the same area for years. They do not follow fads; they stick with the products and services they know. They prefer domestic car manufacturers. Some of their purchases reflect their attention to the maintenance of their homes and yards. For specialized projects, they will contract for roofing, flooring, and carpet installations.

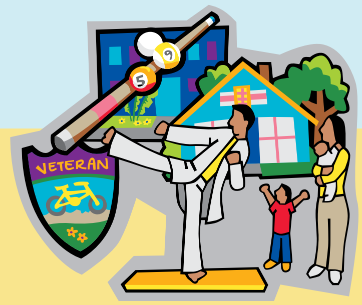
Financially conservative, *Rustbelt Traditions* residents prefer to use a credit union and invest in certificates of deposit. They are likely to have a personal loan that is not a student or vacation loan, and hold low-value variable life and homeowner's insurance policies. Residents watch their pennies, using coupons regularly, especially at Sam's Club. They prefer to see a doctor for diet control and own a stationary bike for exercise.

Favorite leisure activities include bowling; fishing; hunting; and attending auto races, country music shows, and ice hockey games. Watching television is a common pastime for *Rustbelt Traditions* residents. They subscribe to cable TV and watch it regularly, but their favorite programs are sports events.

Source: ESRI, Inc. 2009

Note: 31 percent of south Lansing falls in this cluster, compared to 22 percent in the city as a whole, 11 percent in Ingham County and 7 percent in the state.

48 Great Expectations



Segment Code................. 48
Segment Name................ *Great Expectations*
LifeMode Group .... L7 *High Hopes*
Urbanization Group......... U5 *Urban Outskirts I*

Demographic

Young singles who live alone and married-couple families dominate the *Great Expectations* market, although all household types are represented. The median age is 33.2 years. Some residents are just beginning their careers or family lives. This segment has a higher proportion of residents in their 20s and a higher proportion of householders younger than 35 years old, compared to the U.S. proportions. The ethnic diversity and racial composition of this segment are similar to the U.S. levels.

Socioeconomic

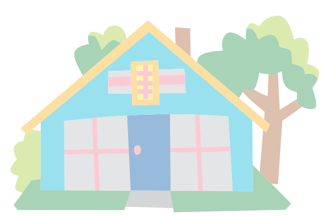
The median household income of $37,684 and the median net worth of $43,152 are low compared to the U.S. values. Approximately 29 percent of residents aged 25 years and older have attended college (slightly above the U.S. average), but only 16 percent hold a bachelor's or graduate degree (somewhat below the U.S. average). Seven percent are enrolled in college or graduate school. The higher proportion of younger residents improves the 68 percent labor force participation rate. The manufacturing, retail, and service industry sectors are the primary employers in this market.

Residential

Great Expectations neighborhoods are located throughout the country, with higher proportions in the Midwest and South. Half of the householders own their homes; the other half rent. More than half of the households are single-family dwellings; approximately 40 percent are apartments in low- or mid-rise buildings. The median home value of $114,837 is approximately three-fifths that of the U.S. median. Most of the housing units in these older suburban neighborhoods were built before 1960.

Preferences

Great Expectations homeowners are not afraid to tackle smaller maintenance and remodeling projects, but they also enjoy a young and active lifestyle. They go out to dinner, to the movies, to bars, and to nightclubs. They enjoy roller-skating; roller-blading; playing Frisbee, chess, and pool; watching foreign films on DVD; and attending auto races. They read music magazines and listen to rock music on the radio. Residents watch courtroom dramas, reality shows, sitcoms, news programs, and dramas on TV. They occasionally take advantage of the convenience of fast-food restaurants. Little traveling is done in this market. Still focused on starting a career, many are not preparing for retirement by investing for the future. Residents shop at major discount and department stores, and also order frequently from catalogs.



Source: ESRI, Inc. 2009

Note: 23 percent of south Lansing falls in this cluster, compared to 22 percent in the city as a whole, 10 percent in Ingham County and 2 percent in the state.

28 Aspiring Young Families

Segment Code................. 28
Segment Name................ *Aspiring Young Families*
LifeMode Group .... L7 *High Hopes*
Urbanization Group......... U4 *Metro Cities II*

Demographic

Most *Aspiring Young Families* residents are young, startup families, a mix of married-couple families with and without children and single parents with children. The average family size is 3.12, near the U.S. average. Approximately two-thirds of the households are families, 27 percent are single-person households, and 9 percent are shared. Annual population growth is 1.37 percent, higher than the U.S. growth. The median age is 30.5 years; one-fifth of residents are in their 20s. This market is ethnically diverse. Although most residents are white, other race groups are also represented. Seventeen percent of residents are black, and 17 percent are of Hispanic origin.

Socioeconomic

The median household income is $50,392, and income is derived mainly from wages. The median net worth for this market is $74,245. Approximately 60 percent of employed residents have professional, management, sales, or office/administrative support positions. Overall, 85 percent of residents aged 25 years and older have graduated from high school, 35 percent have attended college, and 22 percent hold a bachelor's or graduate degree.

Residential

Aspiring Young Families neighborhoods are located in the large, growing metropolitan areas primarily in the South and West, with the highest state concentrations in California, Florida, and Texas. Although almost three-fourths of the households are in the South and West, one-fifth of the housing is located in the Midwest. Half of the households are occupied by renters, half by homeowners. Residents live in moderately priced apartments, single-family houses, and startup townhomes. The average gross rent is approximately $674 per month, just slightly higher than the U.S. average. The median home value is $170,342. Most of the housing units were built after 1969.

Preferences

Aspiring Young Families residents spend much of their discretionary income on their children and their homes. They buy baby and children's products and toys and furniture for the home. Electronic purchases include cameras and video game systems. Residents spend time online visiting chat rooms, searching for employment, playing games, researching real estate, and making travel arrangements. They carry multiple life insurance policies.

Vacations are likely to include visits to theme parks. Leisure time includes dining out, dancing, going to the movies, and attending professional football games. Other activities include fishing, weight lifting, playing basketball, and watching dramas or horror movies on DVD. Residents listen to urban stations and professional basketball games on the radio. When watching TV, they favor sports, news, and entertainment programs and courtroom TV shows. When eating out, *Aspiring Young Families* residents prefer family restaurants such as Tony Roma's and IHOP and fast-food establishments such as Checkers and Jack-in-the-Box.

Source: ESRI, Inc. 2009

Note: 13 percent of south Lansing falls in this cluster, compared to 7 percent in the city as a whole, 5 percent in Ingham County and 1 percent in the state.

51 Metro City Edge

Segment Code................. 51
Segment Name................ *Metro City Edge*
LifeMode Group .... L3 *Metropolis*
Urbanization Group......... U6 *Urban Outskirts II*

Demographic

Metro City Edge is home to married-couple, single-parent, and multigenerational families. Grandparents are caregivers in 4 percent of these households, twice the U.S. rate. The median age of this segment is 29.5 years, attributable to the children, including adult children who still live at home, who comprise approximately half of the population. This market has an average family size of 3.42, somewhat higher than the U.S. average. Most residents are black (73 percent), 17 percent are white, and 4 percent are American Indian (four times the U.S. level).

Socioeconomic

The median household income for this segment is $31,816; the median net worth is $28,666. Although 78 percent of households derive income from wages and salaries, 9 percent receive public assistance and 9 percent receive Supplemental Security Income. Nearly half of employed residents work in service industries. Unemployment in this market is higher than average, at 16 percent. Nine percent of *Metro City Edge* residents aged 25 years and older have a bachelor's or graduate degree, and 27 percent have attended college. Overall, 70 percent have graduated from high school.

Residential

Metro City Edge residents live in older suburban neighborhoods of large metropolitan cities, primarily in the Midwest and South. Sixty-eight percent of households live in single-family dwellings; 14 percent live in buildings with two to four units, many converted from single-family structures into duplexes. The homeownership rate is 56 percent; the median home value is $80,795. Although home prices are relatively inexpensive, many families are young, unsettled, and still renting. Seventy percent of the housing units were built before 1970.

Preferences

Because the primary concern of *Metro City Edge* residents is the welfare of their children, they must spend their money wisely. They tend to shop at grocery stores such as Piggly Wiggly, Kroger, and Winn-Dixie but will make trips to superstores and wholesalers to buy household and children's items in bulk. Some residents have their vehicles serviced at auto repair chains; however, a substantial number of residents will service their own vehicles. When eating out, they prefer fast-food restaurants.

For entertainment, *Metro City Edge* residents watch sitcoms, movies, news programs, courtroom TV shows, cartoons, and sports—such as track and field events—on cable TV. Internet access at home is not a priority; they use the Yellow Pages to look up information. Leisure activities include going to the movies, visiting theme parks, going to professional basketball games, roller-skating, and playing basketball. Residents read music, gardening, and baby magazines and listen to urban and gospel radio stations.

Source: ESRI, Inc. 2009

Note: 7 percent of south Lansing falls in this cluster, compared to 9 percent in the city as a whole, 4 percent in Ingham County and 3 percent in the state.

39 Young and Restless

Segment Code................. 39
Segment Name................ *Young and Restless*
LifeMode Group .... L4 *Solo Acts*
Urbanization Group......... U4 *Metro Cities II*

Demographic

Change is the constant for *Young and Restless* households. This young, on-the-go population has a median age of 28.9 years. Approximately two-thirds of them are younger than 35. Fifty-nine percent of these households are either single person or shared. Neighborhoods are diverse. Almost 60 percent of the residents are white; however, there is an above-average representation of other cultures including 20 percent who are black, 8 percent who are Asian, and 19 percent who are Hispanic.

Socioeconomic

The median household income is $43,645, and the median net worth is $46,514. Although the median household income is below the U.S. median, because only 23 percent of these households include children, discretionary income is higher than for segments with similar income levels. *Young and Restless* is an educated market; one-third of residents aged 25 years and older hold a bachelor's or graduate degree and another one-third have attended college. Thirteen percent are enrolled in college or graduate school. Career is a common element shared by these ethnically diverse residents. Both men and women participate in the labor force at much higher rates than the U.S. rates. The 75 percent labor force participation rate is the highest among all the Community Tapestry segments; the female labor force participation of 73 percent is also the highest. Most employed residents work in professional, sales, service, and office/administrative support positions.

Residential

Young and Restless neighborhoods are found in metropolitan areas, almost entirely in the South (56 percent), West (23 percent), and Midwest (19 percent). The state with the highest concentration is Texas. Householders are primarily renters who live in multiunit buildings. Because 85 percent of the households rent, this segment is ranked fifth for the highest percentage of renters among all the Community Tapestry segments. Most of the housing units were built in the 1970s and 1980s. This market is mobile; 85 percent of the householders have moved in the last five years. Career pursuit affects their decision of where to live.

Preferences

These young, single professionals are pursuing their careers and living a busy lifestyle. They are technologically savvy and take advantage of the convenience provided by many products and services. *Young and Restless* residents rely on the Internet to communicate with friends and families, shop, bank, and look for new employment opportunities. They enjoy the convenience of cell phones, voice mail, and other phone services.

They read magazines to stay current on the latest lifestyle and entertainment trends and are just as likely to read a music magazine as a business publication. They do not read the newspaper as much as the general population. Television viewing is average. Radio is a good way to reach them; favorite formats are urban and alternative music as well as public radio.

Seeing movies at theaters and on DVD is a major source of entertainment. They also enjoy going to bars or nightclubs. Their busy schedule also includes working out at the gym and playing various sports. Domestic vehicles have a slight edge in this market. These residents are one of the more politically liberal segments. Some are still paying off school loans. Many have not yet begun saving for retirement or contributing to investments.

Source: ESRI, Inc. 2009

Note: 7 percent of south Lansing falls in this cluster, compared to 4 percent in the city as a whole, 2 percent in Ingham County and 2 percent in the state.

52 Inner City Tenants

Segment Code................. 52
Segment Name................ *Inner City Tenants*
LifeMode Group .... L8 *Global Roots*
Urbanization Group......... U4 *Metro Cities II*

Demographic

Inner City Tenants residents are a microcosm of urban diversity; their population is represented primarily by white, black, and Hispanic cultures. Twenty-nine percent of the residents are Hispanic. This multicultural market is younger than average, with a median age of 27.9 years. The household composition also reflects their youth. Composed of a mix of household types, 34 percent of households are single person, 28 percent are married-couple families, 21 percent are single-parent families, and 10 percent are shared housing. Turnover is high in these neighborhoods because many individuals are enrolled in nearby colleges and work part-time. These neighborhoods are also a stepping-stone for recent immigrants, with an annual population growth of 0.72 percent.

Socioeconomic

The median household income for this segment is $32,497; the median net worth is $23,508. Because few own their homes, most of their net worth comes from savings. Eighty-three percent of households derive income from wages and salaries; 7 percent receive public assistance income. Thirty percent of the residents aged 25 years and older have attended college. Earning a college degree is at the forefront of their goals, so many work part- and full-time to fund their college education. Approximately half of the employed residents work in white-collar occupations. This market has twice the national level of residents who work in the accommodation/food services industry.

Residential

These neighborhoods are located primarily in the South and West. Most *Inner City Tenants* residents rent economical apartments in mid- or high-rise buildings. One-fifth of the housing is owner-occupied, and the median home value is $132,310. Most of the housing units were built in the 1960s, 1970s, and 1980s. For their average commute to work of 24.6 minutes, many residents drive their vehicle or depend on other modes of transportation. Seventeen percent of the households do not own a vehicle.

Preferences

With their busy lifestyle, *Inner City Tenants* residents frequently eat at fast-food restaurants and shop for groceries at nearby stores such as Pathmark and Food Lion. They prefer easy-to-prepare frozen and canned foods. Internet access at home is not typical in this market, but those who have no access at home will surf the Internet at school or at the library. Playing games and visiting chat rooms are typical online activities. Residents refer to the Yellow Pages frequently to look up all kinds of information. Recent household purchases by this market include video game systems as well as baby food, baby products, baby furniture, and baby equipment. Many households carry renter's insurance. Residents prefer to shop at discount stores such as Wal-Mart and T.J. Maxx.

Inner City Tenants residents go to the movies and attend professional football and basketball games. They water-ski and play football, basketball, and soccer. They read music, baby, computer, and sports magazines; enjoy religious books and adventure stories; and listen to professional football and urban radio. Some enjoy the nightlife, visiting bars and nightclubs to go dancing.

Source: ESRI, Inc. 2009

Note: 6 percent of south Lansing falls in this cluster, compared to 6 percent in the city as a whole, 3 percent in Ingham County and 1 percent in the state.

18 Cozy and Comfortable

Segment Code................. 18
Segment Name................ *Cozy and Comfortable*
LifeMode Group .... L2 *Upscale Avenues*
Urbanization Group......... U8 *Suburban Periphery II*

Demographic

Cozy and Comfortable residents are middle-aged, married couples, comfortably settled in single-family homes in older neighborhoods. The median age is 41.9 years, slightly older than that of the U.S. median. Most residents are married, without children, or married couples with school-age and adult children. This is a relatively large segment, with 8.6 million people (the fifth largest population of all the Community Tapestry segments), and growing moderately by 0.7 percent annually. Most of the residents in this segment are white.

Socioeconomic

Although the labor force is older, they are in no hurry to retire. The labor force participation rate of 66 percent is above average. Unemployment is relatively low, at 5 percent. Employed residents represent a range of occupations, from professional or managerial to service, in a variety of industries. Occupation distributions are similar to U.S. values. The median household income is $65,768. Income is derived from wages and salaries for 80 percent of *Cozy and Comfortable* households. Forty-six percent of households receive income from investments. The median net worth for this market is $176,556.

Residential

Cozy and Comfortable neighborhoods are located in suburban areas, primarily in the Midwest, Northeast, and South. Many residents are still living in the homes in which they raised their children. Single-family structures make up 88 percent of the household inventory. The median home value is $186,456. Sixty-two percent of housing units were built before 1970. Homeownership is at 88 percent, and vacancies are low at 4 percent.

Preferences

Cozy and Comfortable residents prefer to own shares in mutual funds (bonds) and consult a financial planner. Typically, they have a second mortgage, new car loan, and home equity line of credit in addition to medical insurance with Blue Cross/Blue Shield and insurance to cover loss of income from medical causes. Home improvement and remodeling work, including lawn care, are important to *Cozy and Comfortable* residents. Although they will contract for some work, these homeowners will take an active part in many projects, especially painting, hanging wallpaper, and lawn care. For exercise, they play softball and golf, and to relax, they attend ice hockey games, watch science fiction films on DVD, and gamble at casinos. Residents eat at family restaurants such as Bob Evans Farms, Perkins, Big Boy, and Friendly's. Pretzels are a favorite snack along with a caffeine-free diet cola. Vacations are domestic trips, often to the beach. Disney World is a popular destination.

Their home computers are generally several years old, because accessing the Internet is not a priority. Television is significant to *Cozy and Comfortable* residents; many households own four or more sets. Favorites include watching ice hockey and golf games along with programs such as *Live with Regis & Kelly, Antiques Roadshow,* and *King of Queens*. Preferred cable stations include QVC, Home & Garden Television, and the History Channel. Residents listen to ice hockey and professional football games along with classic hits, rock, and soft adult contemporary music on the radio.

Source: ESRI, Inc. 2009

Note: 5 percent of south Lansing falls in this cluster, compared to 7 percent in the city as a whole, 6 percent in Ingham County and 8 percent in the state.

Appendix C: Market Analysis Methodology & Exhibits

This section outlines the methodology and parameters we used to reach our conclusions and recommendations.

METHODOLOGY

Retail Trade Areas

The primary trade area (PTA) for retail business in south Lansing is represented by the south Lansing boundaries shown in Exhibit 12 on page C-6. The south Lansing boundary is reflects the city of Lansing boundaries to the east, west, and south. The boundary on the north side, delineated by AEG and the LEDC, purposefully excludes REO Town, which has its own identity as a small community in Lansing, and generally follows the highway, river, and railroad track.

Traditionally, trade areas delineated for retail purposes account for approximately 70 percent of the sales that retail businesses receive. With exception for Celebration Cinemas, Potter Park Zoo, and other regional attractions in south Lansing, it is assumed that about 70 percent of retail sales come from within the south Lansing boundaries. A number of factors contribute to the boundary of a trade area, including:

1. The locations of competing shopping destinations, particularly regional malls and big-box retailers;
2. Typical shopping patterns, recognizing that shoppers tend to gravitate toward urban centers that are either closer or provide greater shopping opportunities (in the Lansing region, opportunities for cross-shopping are highest in areas with a high concentration of retail, such as Eastwood Towne Center, Edgewood Boulevard, Old Town, Lansing Mall, and Meridian Mall);
3. The locations of physical barriers and transportation networks; recognizing that railroads, river valleys, and highways can fragment and isolate neighborhoods as well as connect the region (notice that south Lansing is bounded on all four sides by highways);
4. The distribution of land use, recognizing that employment and residential districts can draw daytime workers, but that the non-retail uses can also be physical barriers to cross-shopping between neighborhoods.

To account for the sales draw to the Cedar/Pennsylvania/Edgewood area from areas to the south that are more rural, we delineated an extended trade area (ETA), which extends south of the PTA. We delineated the ETA with reference to a drive-time analysis (as shown in Exhibit 12 on page C-6), physical barriers, and retail competitors in the area (such as the Meijer store in Mason). The ETA accounts for roughly 85 percent of sales. The remaining 15 percent is made up through import.

Parameters for Retail Supply-Demand Analysis

The demand side of our analysis involves a comparison of resident income levels with the portion of income that is actually spent on each retail category in the county (*transacted* expenditures). We then compare this to the portion of income that is more typically spent on each retail category within the region and State (resident expenditure *potential*).

By calculating the portion of local expenditures being captured by existing retailers in Ingham County, we determine which categories have remaining sales potential. A comparison of these results to supply by retail category enables us to identify opportunities for additional shops, merchants, or businesses in the ETA. In order to determine what share of opportunity exists in the ETA, we look at total personal income (TPI) because it is the main driver of retail sales. South Lansing's ETA captures 31 percent of the TPI in Ingham County, so it is assumed that the ETA will capture 31 percent of Ingham County's retail opportunity.

The deductive supply-demand analysis assumes that there will be no over-storing in any given market. In other words, it is assumed that each new merchant will reasonably attempt to reach the limit of expenditure potential in each category, but will not exceed a threshold level of market saturation.

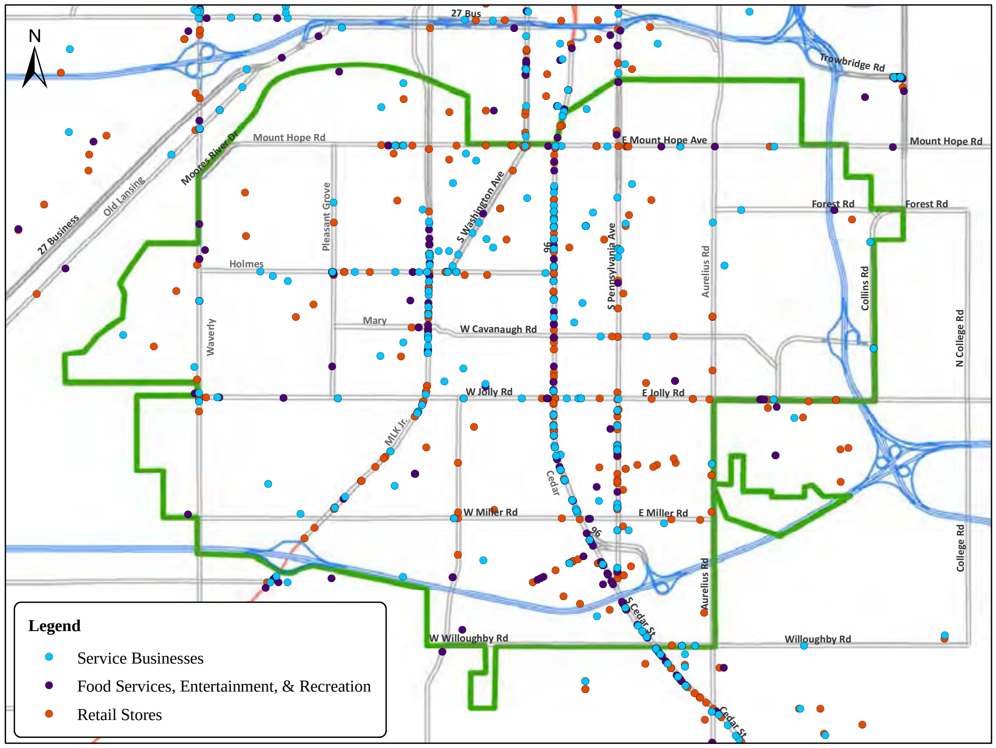
A market's saturation level within any given retail category is usually discovered by trial-and-error, as merchants can learn through experimentation if an increase in space or merchandise no longer results in an increase in sales. This process can be both discouraging and costly, but can be mitigated with an accurate supply-demand analysis.

Up to a certain threshold, expenditures can be influenced by opportunity and competitive levels. If local residents have a capacity to spend, but choose not to because of limited retail selection or quality, they will seek competing destinations, resulting in sales export. If other options do not exist, they may simply curtail spending. This can indicate a considerable opportunity for additional retail space in the market.

Once a market reaches its threshold in retail space, the addition of more space will result in negative sales impact for existing merchants, and cannot be expected to motivate additional spending. Rather, the market share for each retail category is then expected to be redistributed after new stores open, with inevitable negative sales impact on existing units.

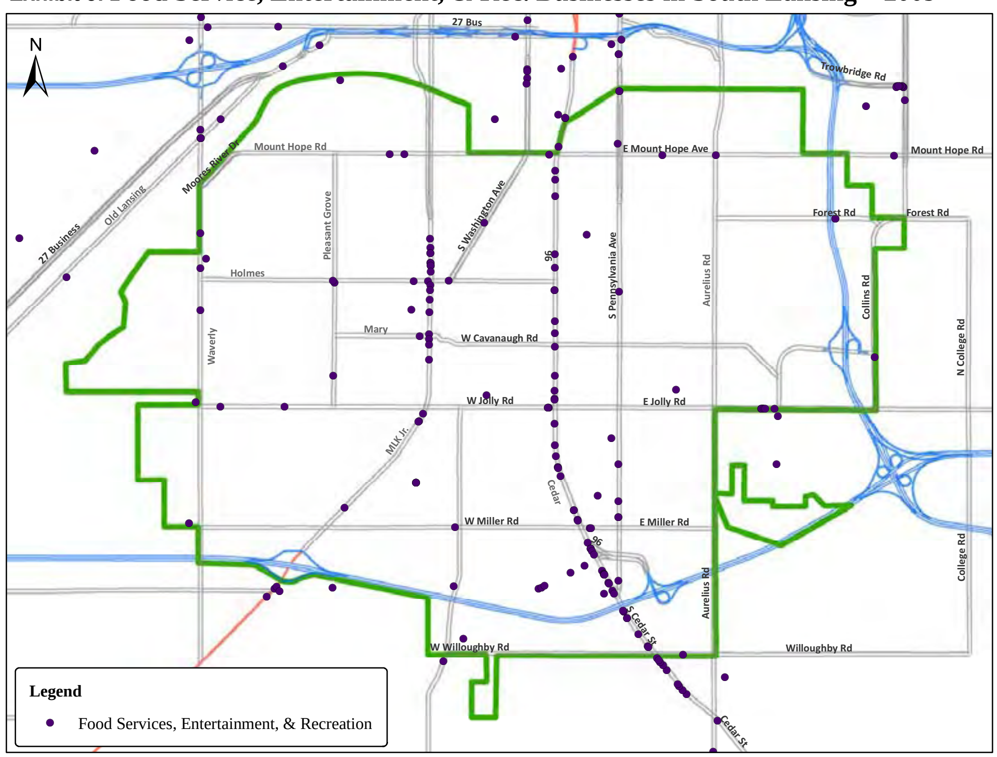
LIST OF EXHIBITS

Exhibit 8. Business Clusters in South Lansing—2009



Source: Anderson Economic Group, LLC 2009.
Base map provided by ESRI, Inc. 2009.

Exhibit 9. Food Service, Entertainment, & Rec. Businesses in South Lansing—2009



Source: Anderson Economic Group, LLC 2009.
Base map provided by ESRI, Inc. 2009.

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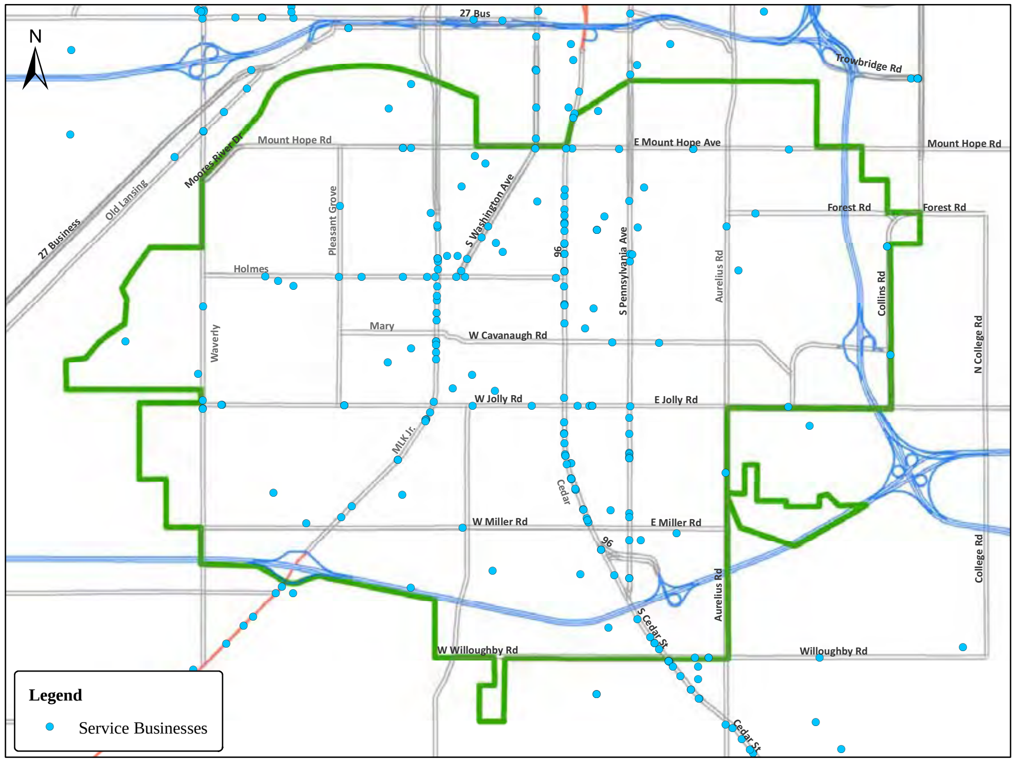
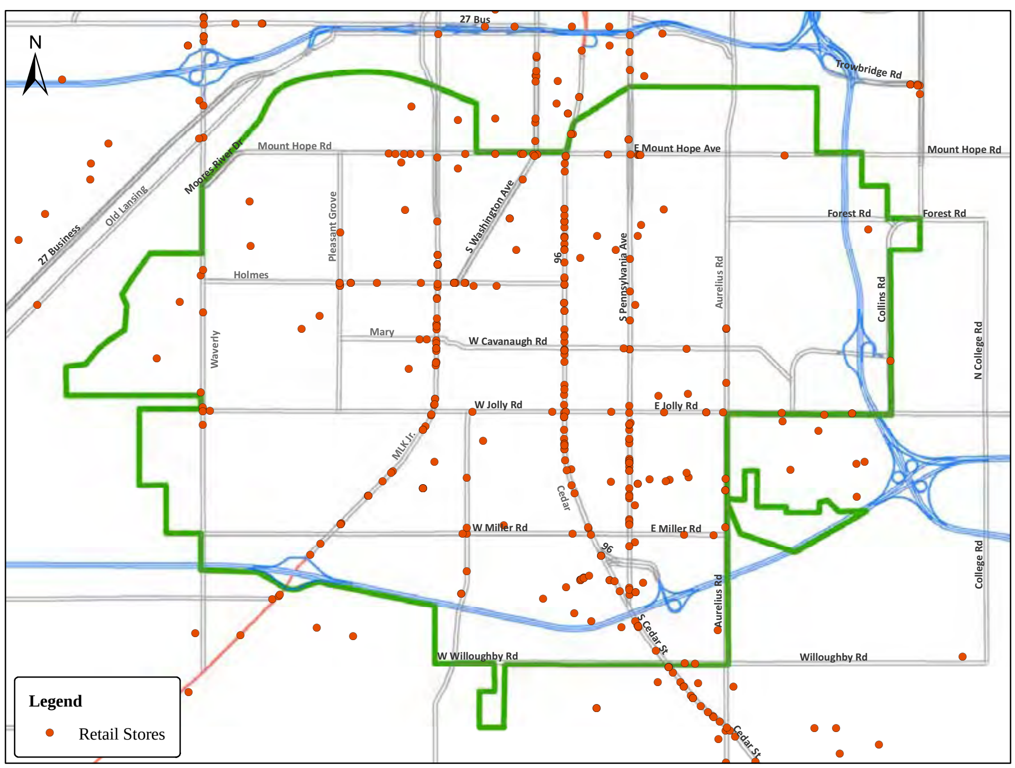
Exhibit 10. Service Businesses in South Lansing—2009



Source: Anderson Economic Group, LLC 2009.
Base map provided by ESRI, Inc. 2009.

Miles 0 0.5 1 2

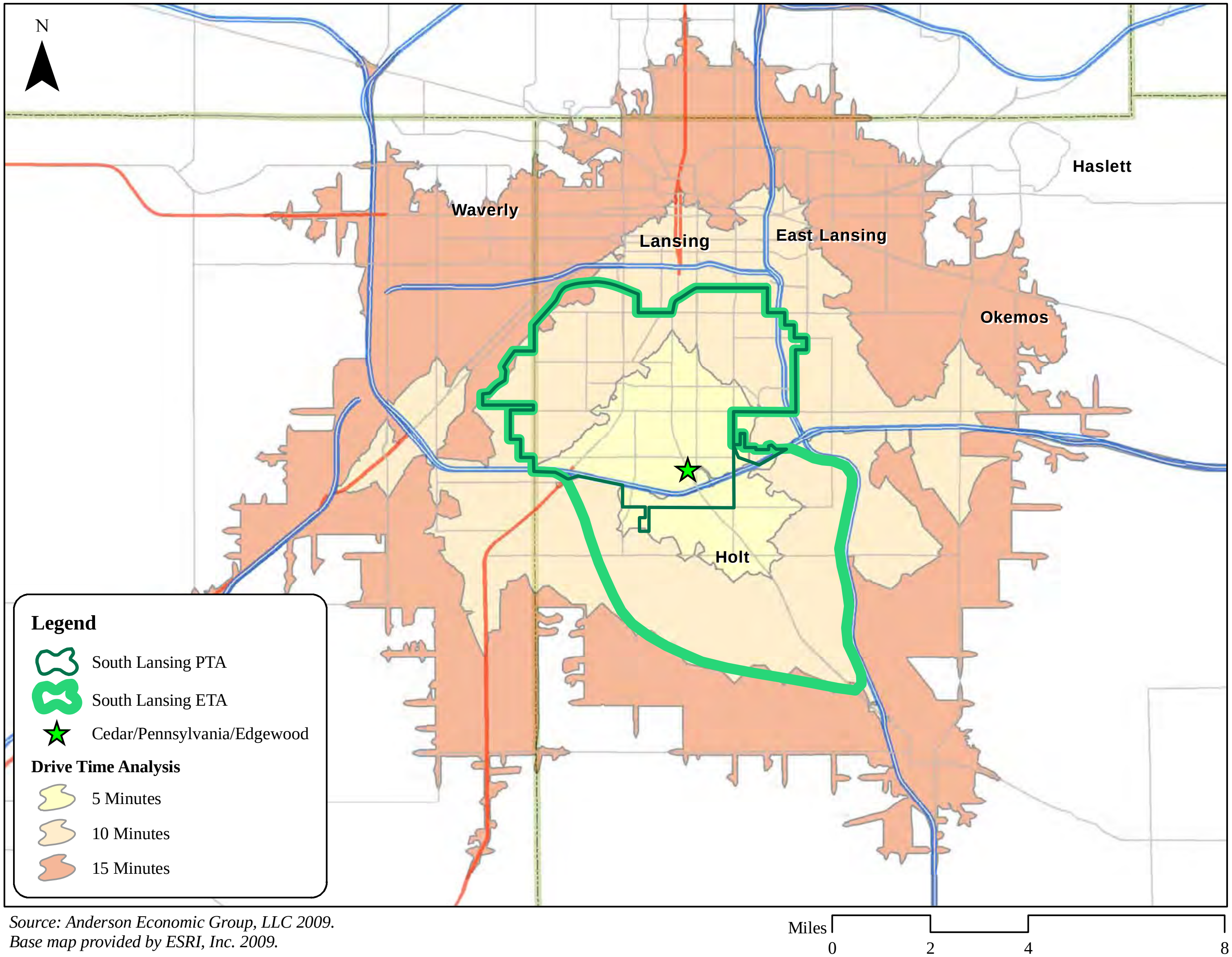
Exhibit 11. Retail Stores in South Lansing—2009



Source: Anderson Economic Group, LLC 2009.
Base map provided by ESRI, Inc. 2009.

Miles 0 0.5 1 2

Exhibit 12. **South Lansing PTA, ETA, and Drive-Time Analysis**



Source: Anderson Economic Group, LLC 2009.
Base map provided by ESRI, Inc. 2009.

Exhibit 13. Consumer Retail Expenditures as a Share of Per Capita Income

NAICS Sub-Sector	Retail Category Description	State of Michigan	Market Share of Analogous Counties: Genesee County	Kalamazoo County	Macomb County	Kent County	*Minimum Share*	*Maximum Share*	Ingham County Market Share
4411	Automobile Dealers	11.0%	13.3%	9.6%	15.3%	11.1%	*9.6%*	*15.3%*	12.6%
4412	Other Motor Vehicle Dealers	0.8%	0.6%	0.9%	1.1%	1.2%	*0.6%*	*1.2%*	0.9%
4413	Automotive Parts, Accessories, and Tire Stores	0.6%	0.7%	0.9%	0.7%	0.8%	*0.6%*	*0.9%*	0.7%
4421	Furniture Stores	1.3%	1.3%	1.3%	1.8%	2.0%	*1.3%*	*2.0%*	1.9%
4422	Home Furnishings Stores	0.5%	0.5%	0.2%	0.5%	0.7%	*0.2%*	*0.7%*	0.8%
4431	Electronics and Appliance Stores	1.2%	1.2%	1.8%	1.2%	2.4%	*1.2%*	*2.4%*	1.8%
4441	Building Material and Supplies Dealers	3.5%	4.1%	4.6%	4.3%	5.1%	*3.5%*	*5.1%*	4.4%
4442	Lawn and Garden Equipment and Supplies Stores	0.4%	0.3%	0.4%	0.4%	0.6%	*0.3%*	*0.6%*	0.3%
4451	Grocery Stores	4.9%	5.9%	3.7%	5.3%	4.6%	*3.7%*	*5.9%*	4.7%
4452	Specialty Food Stores	0.2%	0.2%	0.1%	0.4%	0.2%	*0.1%*	*0.4%*	0.1%
4453	Beer, Wine, and Liquor Stores	0.4%	0.4%	0.3%	0.4%	0.3%	*0.3%*	*0.4%*	0.3%
4461	Health and Personal Care Stores	2.8%	3.3%	2.5%	3.6%	2.3%	*2.3%*	*3.6%*	3.0%
4471	Gasoline Stations with Convenience Stores	3.6%	4.1%	3.1%	2.8%	3.1%	*2.8%*	*4.1%*	3.9%
4481	Clothing Stores	1.4%	1.4%	1.5%	1.3%	2.0%	*1.3%*	*2.0%*	1.9%
4482	Shoe Stores	0.3%	0.3%	0.3%	0.3%	0.3%	*0.3%*	*0.3%*	0.3%
4483	Jewelry, Luggage, and Leather Goods Stores	0.3%	0.3%	0.3%	0.3%	0.3%	*0.3%*	*0.3%*	0.4%
4511	Sporting Goods, Hobby, and Musical Instrument Stores	1.1%	1.2%	1.5%	1.2%	1.7%	*1.1%*	*1.7%*	1.9%
4512	Book, Periodical, and Music Stores	0.2%	0.3%	0.1%	0.2%	D	*0.1%*	*0.3%*	0.7%
4521	Department Stores	2.3%	4.3%	1.5%	4.3%	D	*1.5%*	*4.3%*	D
4529	Other General Merchandise Stores	0.2%	5.1%	0.1%	4.4%	D	*0.1%*	*5.1%*	D
4531	Florists	0.2%	0.1%	0.1%	0.2%	0.1%	*0.1%*	*0.2%*	0.2%
4532	Office Supplies, Stationery, and Gift Stores	0.3%	0.5%	0.1%	0.5%	0.6%	*0.1%*	*0.6%*	0.7%
4533	Used Merchandise Stores	0.1%	0.1%	0.1%	0.1%	0.1%	*0.1%*	*0.1%*	0.2%
4539	Other Miscellaneous Store Retailers	0.1%	0.7%	0.1%	0.6%	0.6%	*0.1%*	*0.7%*	0.5%
7111	Performing Arts Companies	0.1%	D	D	D	D	*0.1%*	*0.1%*	D
7112	Spectator Sports	0.2%	D	D	D	D	*0.2%*	*0.2%*	D
7113	Promoters of Performing Arts, Sports, and Similar Events	0.2%	D	D	D	0.2%	*0.2%*	*0.2%*	D
7114	Agents and Mgrs for Artists, Ath., Entertain., Other Public Figures	0.0%	D	D	D	D	*0.0%*	*0.0%*	D
7121	Museums, Historical Sites, and Similar Institutions	0.1%	D	D	D	D	*0.1%*	*0.1%*	D
7131	Amusement Parks and Arcades	0.0%	D	D	D	D	*0.0%*	*0.0%*	D
7132	Gambling Industries	0.6%	D	D	D	D	*0.6%*	*0.6%*	D
7139	Other Amusement and Recreation Industries	0.7%	0.2%	D	0.2%	0.4%	*0.2%*	*0.7%*	D
7221	Full-Service Restaurants	1.9%	1.8%	2.2%	2.0%	2.4%	*1.8%*	*2.4%*	2.4%
7222	Limited-Service Eating Places	1.8%	2.0%	2.2%	1.7%	1.8%	*1.7%*	*2.2%*	2.7%
7223	Special Food Services	0.3%	0.2%	0.3%	0.4%	0.3%	*0.2%*	*0.4%*	0.2%
7224	Drinking Places (Alcoholic Beverages)	0.2%	0.3%	0.2%	0.2%	0.2%	*0.2%*	*0.3%*	0.4%
8121	Personal Care Services	0.3%	0.2%	0.0%	0.3%	0.4%	*0.0%*	*0.4%*	0.5%
8123	Drycleaning and Laundary Services	0.3%	0.3%	0.6%	0.1%	0.5%	*0.1%*	*0.6%*	0.4%

Source: Anderson Economic Group, LLC 2009 analysis of U.S. Census of Retail Trade, expenditures data, 2002.

Note: The notation of "D" indicates suppressed information for the NAICS subsector.

Exhibit 14. Retail Gap Results

Description	2010 ETA Gap (square feet) Conservative	2010 ETA Gap (square feet) Aggressive	2014 ETA Gap (square feet) Conservative	2014 ETA Gap (square feet) Aggressive
Furniture & Home Furnishings Stores	0	8,100	0	9,100
Furniture Stores	0	11,500	0	12,900
All Other Home Furnishings Stores	0	1,600	0	1,800
	0	21,200	0	23,800
Electronics & Appliance Stores	0	28,500	0	31,900
Appliance, Television, & Other Electronics Stores	18,300	49,900	20,500	55,900
Household Appliance Stores	9,900	15,200	11,100	17,000
	28,200	93,600	31,600	104,800
Building Material & Garden Equipment & Supplies Dealers	4,700	89,000	5,300	99,700
Building Material & Supplies Dealers	0	62,900	0	70,400
Home Centers	48,100	48,100	53,900	53,900
Hardware Stores	4,000	7,800	4,500	8,700
Other Building Material Dealers	3,400	60,800	3,800	68,100
Lawn & Garden Equipment & Supplies Stores	10,900	26,000	12,200	29,100
Outdoor Power Equipment Stores	2,200	6,200	2,500	6,900
Nursery, Garden Center, & Farm Supply Stores	7,800	11,500	8,700	12,900
	81,100	312,300	90,900	349,700
Food & Beverage Stores	12,100	50,500	13,600	56,600
Grocery Stores	5,600	44,300	6,300	49,600
Supermarkets & Other Grocery (except Convenience) Stores	33,200	69,100	37,200	77,400
Specialty Food Stores	5,600	14,000	6,300	15,700
Beer, Wine, & Liquor Stores	4,700	6,200	5,300	6,900
	61,200	184,100	68,700	206,200
Health & Personal Care Stores	0	33,800	0	37,900
Pharmacies & Drug Stores	16,400	50,500	18,400	56,600
Cosmetics, Beauty Supplies, & Perfume Stores	600	900	700	1,000
Optical Goods Stores	900	1,600	1,000	1,800
Other Health & Personal Care Stores	2,200	14,000	2,500	15,700
Food (Health) Supplement Stores	1,200	4,000	1,300	4,500
All Other Health & Personal Care Stores	1,600	10,200	1,800	11,400
	22,900	115,000	25,700	128,900
Gasoline Stations	0	3,700	0	4,100
Gasoline Stations w/ Convenience Stores	0	1,900	0	2,100
Other Gasoline Stations	1,200	4,000	1,300	4,500
	1,200	9,600	1,300	10,700
Clothing Stores	0	1,900	0	2,100
Men's Clothing Stores	0	900	0	1,000
Children's & Infants' Clothing Stores	0	1,200	0	1,300
Other Clothing Stores	3,400	5,300	3,800	5,900
	3,400	9,300	3,800	10,300
Sporting Goods Stores	0	1,600	0	1,800
Hobby, Toy, & Game Stores	0	1,200	0	1,300
Musical Instrument & Supplies Stores	2,500	6,500	2,800	7,300
News Dealers & Newsst&s	300	300	300	300
Prerecorded Tape, Compact Disc, & Record Stores	7,100	11,500	8,000	12,900
	9,900	21,100	11,100	23,600
Department Stores	59,800	61,100	67,000	68,400
Department Stores (except Discount Dpt. Stores)	900	9,300	1,000	10,400
Discount Department Stores	59,200	75,000	66,300	84,000
Other General Merch&ise Stores	87,400	106,600	97,900	119,400
Variety Store	2,500	3,700	2,800	4,100
	209,800	255,700	235,000	286,300

Source: Anderson Economic Group, LLC 2009 analysis of U.S. Census of Retail Trade data, 2002.

Description	2010 ETA Gap (square feet) Conservative	2010 ETA Gap (square feet) Aggressive	2014 ETA Gap (square feet) Conservative	2014 ETA Gap (square feet) Aggressive
Office Supplies & Stationery Stores	0	3,400	0	3,800
Other Miscellaneous Store Retailers	28,200	42,800	31,600	47,900
Pet & Pet Supplies Stores	0	2,500	0	2,800
Art Dealers	0	900	0	1,000
Manufactured (Mobile) Home Dealers	900	1,200	1,000	1,300
	29,100	50,800	32,600	56,800
Motion Picture Theatres (except drive-ins)	8,400	8,400	9,400	9,400
	8,400	8,400	9,400	9,400
Formal Wear & Costume Rental	1,200	1,200	1,300	1,300
	1,200	1,200	1,300	1,300
Arts, Entertainment, & Recreation	0	133,000	0	149,000
Performing Arts, Spectator Sports, & Related Industries	11,500	11,500	12,900	12,900
Theater Companies & Dinner Theaters	13,000	15,500	14,600	17,400
Musical Groups & Artists	7,800	7,800	8,700	8,700
Sports Teams & Clubs	36,300	36,300	40,700	40,700
Racetracks	14,300	14,300	16,000	16,000
Other Spectator Sports	1,600	1,600	1,800	1,800
Promoters of Perf. Arts, Sports, & Similar Events	47,100	49,900	52,800	55,900
Promoters of Perf. Arts, Sports, & Similar Events w/ Facilities	33,800	33,800	37,900	37,900
Promoters of Perf, Arts, Sports, & Similar Events w/o Facilities	9,300	9,300	10,400	10,400
Agents & Mgrs for Artists, Ath., Entert., & Public Figures	3,700	3,700	4,100	4,100
Independent Artists, Writers, & Performers	6,800	8,700	7,600	9,700
	185,200	325,400	207,500	364,500
Museums	18,000	18,000	20,200	20,200
Historical Sites	300	300	300	300
Zoos & Botanical Gardens	2,500	2,500	2,800	2,800
Nature Parks & Other Similar Institutions	300	300	300	300
	21,100	21,100	23,600	23,600
Amusement, Gambling, & Recreation Industries	0	15,200	0	17,000
Amusement Parks & Arcades	6,800	6,800	7,600	7,600
Amusement & Theme Parks	1,600	1,600	1,800	1,800
Amusement Arcades	4,700	4,700	5,300	5,300
Other Amusement & Recreation Industries	58,300	58,300	65,300	65,300
Golf Courses & Country Clubs	29,800	61,100	33,400	68,400
Skiing Facilities	3,400	3,400	3,800	3,800
Marinas	25,400	30,400	28,400	34,000
Bowling Centers	24,800	34,100	27,800	38,200
All Other Amusement & Recreation Industries	1,200	1,200	1,300	1,300
	156,000	216,800	174,700	242,700
Special Food Services	4,700	8,400	5,300	9,400
Food Service Contractors	23,900	23,900	26,800	26,800
Caterers	7,400	7,400	8,300	8,300
Mobile Food Services	900	900	1,000	1,000
	36,900	40,600	41,400	45,500
Barber Shops	300	300	300	300
Nail Salons	600	600	700	700
Diet & Weight Reducing Centers	300	2,500	300	2,800
Drycleaning & Laundary Services	9,000	44,300	10,100	49,600
Coin-Operated Laundries & Drycleaners	600	600	700	700
	10,800	48,300	12,100	54,100
TOTAL	**866,400**	**1,734,500**	**970,700**	**1,942,200**

Source: Anderson Economic Group, LLC 2009 analysis of U.S. Census of Retail Trade data, 2002.